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Contents

Getting Started	Welcome to GroupWise		
Logging into GroupWise	Logging into GroupWise		
Working with Items in Your Mailbox Sending and Receiving Items Attaching Files Managing Sent Items Managing Received Items			
Scheduling Group and Posted Items	Scheduling Appointments, Tasks, and Reminder Notes		
Using Your Calendar	Using Your Daily Calendar		
Managing Your Mailbox	Using the Folder List		
Using the Address Book	Using the Address Book: An Overview Searching for Users and Resources Using LDAP in the Address Book Using Groups to Address Items Moving Addresses from One Address Book to Another Displaying Different Information in the Address Book Using the Address Book to Send Messages Using the Address Book to Send Messages 122 Using Frequent Contacts Creating Personal Address Books 127 Setting Personal Address Book Properties Viewing Groups, Organizations, or Resources in the Address Book 134		
Finding Items in Your Mailbox	Finding Items 137 Finding Text in Items 144 Filtering 144		
Creating and Working with Documents	Managing Your Documents in GroupWise159Creating Documents162Organizing Your Documents (Folder)166Importing Documents into a GroupWise Library169Sharing Documents174Viewing the History of a Document179		

	Checking Out Documents Checking In Documents Deleting Documents Copying Documents Saving Documents Opening Documents Storing Multiple Versions of a Document Managing Groups of Documents Viewing Documents When Your Network Is Unavailable Integrating GroupWise with Your Applications Returning Documents to the Library Replacing a Document with a File from Backup	
Using GroupWise Away from the Office	Using GroupWise Remote: An Overview Preparing to Use Remote Sending and Retrieving Items in Remote Configuring Your Remote Connections	230 232 238 252
Using Your Phone with GroupWise	Using Dial Sender	260 260
Customizing GroupWise	Setting Options for GroupWise Assigning Passwords to Your Mailbox Customizing Your Toolbar Customizing Your Library Settings Using Startup Options	
Using GroupWise Desktop	Using GorupWise Desktop	283 283 287 288 290
Using GroupWise Imaging	Using Imaging: An Overview Using Annotations Scanning Opening an Existing Image E-mailing an Image	295 296 298 299 300
Sending and Receiving Workflow Items	Using Workflow: An Overview	302
Index	Index	309

Getting Started

Welcome to GroupWise

GroupWise® is software that works to meet all your messaging, scheduling, calendaring, and document management needs.

Starting GroupWise

Before you can begin using GroupWise, you must run the GroupWise Setup program. The Setup program wizard will take you step-by-step through the setup process.

Running the Setup Program

- 1 Contact your system administrator for the location of the GroupWise Setup program, SETUP.EXE. You need to know the location of the program before continuing.
- **2** Make sure you are logged in as yourself on your computer.
- 3 Click Start ► Run.
- **4** Type the path to the GroupWise SETUP.EXE program ► click **OK**.
- **5** Follow the instructions in the Setup program.

Starting GroupWise

Double-click on your desktop.

The GroupWise Main Window appears. See A Brief Tour of GroupWise under Getting Started for more information about the Main Window.

Getting Help

If you have trouble using GroupWise, you can get help from several sources. Online Help is available from wherever you are in GroupWise. In addition to online Help, you can find answers to your questions at the Cool Solutions Web Community which is available on the Web at www.gwmag.com.

Using Online Help

Much of the GroupWise Client documentation is available online. A variety of access methods into online Help are provided so you can pick which method suits your needs.

How Do I • Lists help topics organized by related tasks.

Click Help ► Help Topics ► the Contents tab ► double-click How Do



Index • Displays key words to help you find information, much like an index in a book.

Click **Help** ► Help Topics ► the **Index** tab.



Guides • Walk you through a task or series of tasks to help you learn GroupWise features. You may simply read the instructions in the guides if you'd rather not perform the steps.

1 Click Help ▶ Guides.



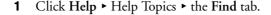
Context-Sensitive Help • Displays a brief explanation about any option in a dialog box.

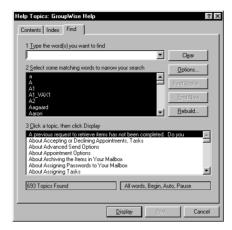
1 In a dialog box, click

▶ click an option.



Find • Lets you type specific words or phrases and displays help topics containing those words or phrases.



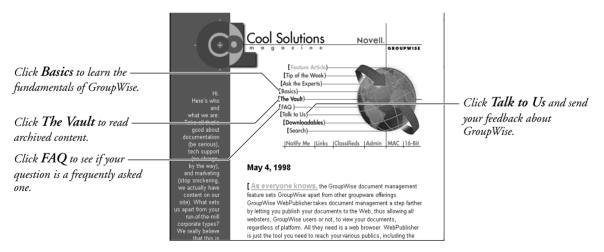


Using Cool Solutions

Cool Solutions is a web site devoted to helping you learn all about GroupWise. In Cool Solutions you'll find helpful tips and regular feature articles that give you all the details about using GroupWise. In addition, you'll find resources such as downloadable Quick Start Cards and demos that will help you get started. The following are samples of what you'll find.

Opening Cool Solutions •

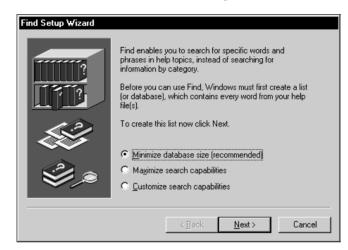
In your web browser, type www.gwmag.com.



Sending Your Questions to the GroupWise Experts • Ask the Experts is your forum to ask questions about GroupWise. If you're wondering how to do something in GroupWise, such as share folders, print a calendar, and so on, and you can't find instructions in the documentation or the Vault, send your question to the experts.

- 1 In your web browser, type www.gwmag.com.
- 2 Click Ask the Experts ► Ask Us.
- **3** Click Ask the Cool Solutions Experts.

Depending on the size of your monitor, you may need to scroll to find the Ask the Cool Solutions Experts link.



- **4** Type your information and your question.
- Click Send.

Downloading Resources from Cool Solutions • On the Downloadables page, you'll find lots of resources that you can download and use in your organization. There are demos that show you how to use GroupWise, feature articles from the web site, User's Guides, Quick Start Cards, and more.

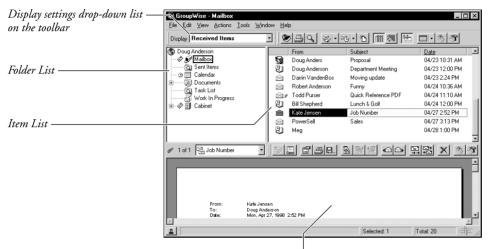
- 1 In your web browser, type www.gwmag.com.
- 2 Click Downloadables.
- **3** Click the item you want to download, then follow the instructions.

A Brief Tour of GroupWise

GroupWise integrates all your messaging, scheduling, calendaring, and document management needs into one place.

The Main Window

The Main Window is your "home base" for GroupWise. From the Main Window you can read your messages, schedule appointments, view your Calendar, open documents, and much more.



The QuickViewer lets you read messages and their attachments in your Mailbox without opening them in a separate window.

You can open more than one Main Window in GroupWise. This is useful if you proxy for another user. You can look at your own Main Window and the Main Window belonging to the person you are proxying for. You might also want to open a certain folder in one window and look at your Calendar in another. You can open as many Main Windows as your computer's memory will allow.

The basic components of the Main Window are explained below.

The toolbar lets you quickly accomplish common GroupWise tasks, such as opening the Address Book, sending mail messages, and displaying your Calendar. Point your mouse over any toolbar button and a tool tip displays the name of the feature. The display settings drop-down list lets you quickly change the display of your Item List.

Folder List

The Folder List at the left of the Main Window lets you organize the items you send, receive, post, and share. You can also create new folders to store your items in. Here is what you'll find in each of the default folders:



Your user folder (indicated by your name) represents your GroupWise database. Your user folder contains other folders as well as items.



Your Mailbox includes all items you've sent and received. Use the display settings drop-down list to view only sent items or received items.



Your Cabinet is a container for all your personal folders and shared folders.



Your Documents folder contains references to documents that you have created or opened. If you so specify, any documents you view or import will also be added to this folder. See *Organizing Your Documents* under *Creating and Working with Documents* for more information.



Work In Progress contains unfinished messages. You can work on a message, then send it later.



The Trash contains all the items and documents you've deleted.

Item List

The Item List at the right of the Main Window displays your mail and phone messages, appointments, reminder notes, tasks, and document references. Use the display settings drop-down list on the toolbar to display incoming items, outgoing items, and posted items.

QuickViewer

The QuickViewer opens below the Item List box. You can quickly scan items and their attachments in the QuickViewer rather than opening each item in another window.

Understanding Your Mailbox

All of your items, whether you send or receive them, are stored in your GroupWise Mailbox on the network. You can quickly display only incoming items, outgoing items, posted items, or draft items by clicking a setting on the display settings drop-down list. You can further restrict which items display in your Mailbox by using Filter. See *Filtering* under *Finding Items in Your Mailbox* for more information.

You can organize your messages by moving them into folders within your Cabinet.

Unread Items in Your Mailbox

All unopened items in your Mailbox are bolded to help you easily identify which items and documents you have not yet read.

Collapsed discussion threads are also marked with bold text to show that there are items in the thread that are unread. This saves you the time of expanding each thread to check if there are newly posted items.

Icons Appearing Next to Items in Your Mailbox

Next to each item you receive is an icon that helps you understand a little about the item before you even read it. For example, you can determine the type of item (mail, appointment, and so forth) and its priority. You can also see whether the item has a file attached, whether an item you sent could not be delivered to some recipients, and more.

Icon	Description
×	Appears next to an item you have sent. It indicates that GroupWise could not deliver the item to one or more recipients.
X	Appears next to a task or an appointment you have sent. Next to a task, it indicates that at least one recipient deleted the task without marking it Completed. Next to an appointment, it indicates that at least one recipient deleted or declined the appointment without accepting it.
Ţ	Appears next to an item you have sent. Next to an appointment, it indicates that not every recipient has accepted the appointment. Next to a task, it indicates that not every recipient has completed the task. Next to other item types, it indicates that not all recipients have opened the item or that not all recipients have deleted the item.
0	One or more attachments are included with the item.
4 €	One or more sound annotations are included with the item, or the item is a voice mail message.
_	Draft item.
~	Appears next to an item you have sent. It indicates that GroupWise successfully delivered or transferred the item to all the recipients.

Icon	Description
ge ge	Posted item.
#	Specific version of a document.
*	Official version of a document.
9 (3)	Unopened discussion topic posted in a shared folder.
⁹ 🔊	Opened discussion topic posted in a shared folder.
♦	Unopened workflow item.
	Opened workflow item.
'-" '-" '-"	Unopened mail message with a low, standard, or high priority.
	Opened mail message with a low, standard, or high priority.
>>>	Unopened appointment with a low, standard, or high priority.
9191	Opened appointment with a low, standard, or high priority.
999	Unopened task with a low, standard, or high priority.
<i>\$</i>	Opened task with a low, standard, or high priority.
=======================================	Unopened reminder note with a low, standard, or high priority.
6 6	Opened reminder note with a low, standard, or high priority.
<i>®®</i>	Unopened phone message with a low, standard, or high priority.
	Opened phone message with a low, standard, or high priority.

Icon

Description



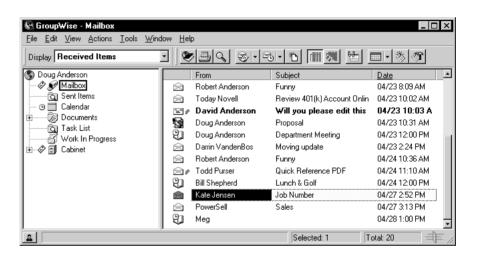
The sender has requested that you reply to this item. The item can be a low, standard, or high priority.

Viewing Options in Your Mailbox

You can view the items in your Mailbox three different ways, depending on how vou want the information organized. Details, Discussion Threads, and As Calendar are all found on the View menu.

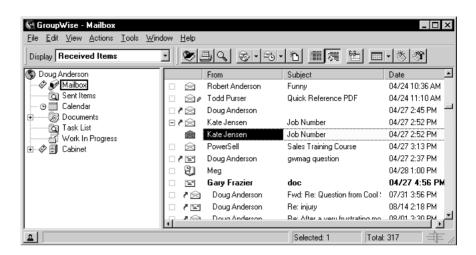
Details • Details displays a list of your items and information about them in columns, including Subject, Date, CC, Priority, Document Type, Due Date, Size, Version#, and many other categories. Details is the default Mailbox view if you have not changed your Mailbox properties.

Click on the toolbar to view by Details.



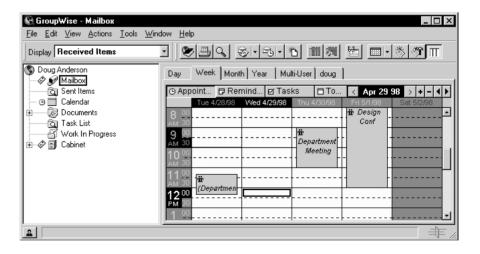
Discussion Threads • Discussion Threads shows the e-mail discussion of an original item and all its replies grouped in hierarchical order.

Click on the toolbar to view by Discussion Threads.



As Calendar • As Calendar displays all scheduled items saved in a particular folder. This is useful if you organize all your appointments and other items for a specific project in one folder either manually or with rules.

on the toolbar to view As Calendar.



Using the Columns in Your Mailbox

The Item List in the Main Window is divided into columns. Each column displays information about the items in the list. For example, different columns display the subject of items, the date they were sent, and so forth. You can customize the column display for each folder in your Main Window by changing column widths, by adding or deleting columns, and by changing the order of columns. You can even define a different column display setting for each personal folder in your Folder List.

Adding Columns to Your Mailbox

- In the Main Window, open the folder you want to add columns to.
- Right-click a column heading ▶ click a column title.

or

Right-click a column heading ▶ click More Columns ▶ a column in the Available Columns list box ▶ Add.

Tips

 You can select multiple columns to add by pressing Ctrl while you click columns.

Changing the Order of Columns

- In the Main Window, open the folder you want to change columns settings
- Right-click a column heading ▶ click More Columns.
- Click a column name in the Selected Columns box.
- Click **Down** or **Up**.
- Click OK.

Tips

- You can also drag columns to new positions in the Main Window.
- You can define different column settings for each folder in your Mailbox in Properties.

Resizing the Columns in Your Mailbox

- In the Main Window, click the folder you want to resize columns in.
- Position the mouse pointer over the edge of a column heading until a twoheaded arrow appears • drag to resize the column.

Sorting Column Items in Your Mailbox

Click the folder containing the items you want to sort.

Click View ► Display Settings ► Sort.



- 3 Click the category you want to sort by in the list box.
- 4 Click **Ascending** to sort from A to Z.

Click **Descending** to sort from Z to A.

Click OK.

Removing Columns from Your Mailbox

- In the Main Window, open the folder you want to remove columns from.
- Drag the column heading off the column bar.

Using the Toolbar

Use the toolbar to access many of the features and options found in GroupWise. When you use certain features (for example, when you are in your Calendar), the toolbar for that feature appears.

To find out about a toolbar button, move the mouse pointer over the button and read the tool tip that appears.

You can customize each toolbar by adding and deleting buttons, choosing button order, and placing separators between buttons. See Customizing Your Toolbar under Customizing GroupWise.

Changing the Toolbar Display

- If the toolbar is not displayed, click View ► Toolbar.
- Right-click the toolbar ▶ click **Properties**.

Click the **Show** tab.



Choose how you want the toolbar to display ▶ click OK.

Logging into GroupWise

Logging into GroupWise

When you start GroupWise®, a dialog box gives you the opportunity to log in to GroupWise. The Startup dialog box changes, depending on the information GroupWise needs in order to open your Mailbox. For example, if you have a password on your Mailbox and log into the network and start GroupWise from your own machine, you may get a dialog box that asks for your password.

However, if GroupWise can't find the post office (for example, if the location of the post office changed or if the server containing the post office is currently out of service), you may get a dialog box that lets you specify the path to the post office or the TCP/IP address of the post office agent, your username, and your password.

You can use a startup option to force the Startup dialog box to be displayed when you start GroupWise.

Logging into Your Mailbox

- 1 Make sure you are logged into your network.
- 2 Start GroupWise.

If you have not specified a password for your Mailbox and GroupWise needs no additional information, you will bypass the Startup dialog box and GroupWise will be displayed.

If you are prompted for a password or other information, type the password or required information in the appropriate box • click OK.

Tips

Other information GroupWise might require includes the TCP/IP address and port of the post office agent, the path to the network post office or the path to the remote database. If you do not know the required information, contact your system administrator.

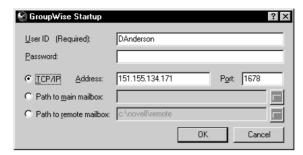
Logging into Your Mailbox from Another User's Workstation

Log into the network with your own user ID.

or

To force the GroupWise Startup dialog box to be displayed, right-click the GroupWise icon on the desktop ▶ click Properties ▶ click the Shortcut tab ▶ in the Target box, after the GroupWise executable, type a space ▶ type /@u-? ► click **OK**.

Start GroupWise.



- **3** Type your user ID if it is not already displayed in the User ID box.
- **4** Click the **Password** box ▶ type your password ▶ click **OK**.

Tips

 You must be on the same post office as the other user to log into your own Mailbox from his or her workstation.

Making Your Password Apply to Others Only

- **1** Start GroupWise.
- **2** Click the **Password** box ▶ type your password.
- **3** Select the Remember My Password check box ▶ click OK.

Tips

- Your system administrator can choose to disable Remember My Password for users on your system.
- This option is machine-specific, meaning that if you tell GroupWise to remember your password on one workstation, then log into another machine, you may be prompted for your password again. If you select the Remember My Password check box on the new workstation, GroupWise will remember your password on it also.
- You can also select Remember My Password in Security Options.
- If you change your mind and want to be prompted for your password, click Tools ➤ Options ➤ double-click Security ➤ click the Password tab ➤ deselect Remember My Password.
- You can have NDS remember your password using Security in Options. Click No Password Required with NDS. Once you have selected this option, you will not be prompted for your GroupWise password on any machine, as long as you have logged into NDS as yourself first. You will still be prompted for a password when using Remote.

Specifying the Path to the Remote Database

- Start GroupWise remotely. 1
- 2 In the Startup dialog box, type your password.
- Click the Path to Remote Mailbox box ▶ type or browse to the path to the 3 remote database. For example, you might type C:\REMOTE.

or

If you do not have a remote database, type a path to where you want to have a remote database. When you click OK, you are prompted to create the remote database.

Click OK.

Tips

GroupWise starts remotely if you have no network connection, if GroupWise fails after several attempts to connect to the Master Mailbox (for example, if the server that contains the post office is currently out of service), or if you use the /ps-<PATH> startup option.

Specifying the TCP/IP **Address of the Post** Office Agent

- Start GroupWise.
- In the Startup dialog box, click TCP/IP.



- Type the TCP/IP address of the Post Office Agent. If you do not know the TCP/IP address or port for the post office agent, contact your system administrator.
- Specify the Post Office Agent port.

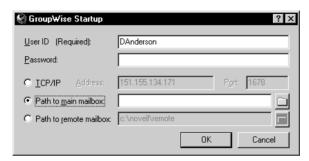
5 Click OK.

Tips

 You can specify either the path to the network post office or the TCP/IP address of the Post Office Agent.

Changing the Path to the Network Post Office

- 1 Start GroupWise.
- 2 In the Startup dialog box, click Path to Main Mailbox.



3 Type or browse to the path to the network post office. For example, you might type **X:\PO**.

If you do not know the path to the network post office, contact your system administrator.

4 Click OK.

Tips

- You can specify either the path to the network post office or the TCP/IP address of the post office agent.
- You can also use the /ph- startup option to specify the path to the post office.

Working with Items in Your Mailbox

Sending and Receiving Items

Every day you communicate in a variety of ways. To accommodate these needs, GroupWise® delivers your items using a variety of item types. Each item type is explained below.

Mail

A mail message is for basic correspondence. You can use it for anything resembling a memorandum or letter.

Phone Message

A phone message helps you inform someone of a phone call or visitor. You can include such information as caller, phone number, company, urgency of the call, and so forth.

Appointment

An appointment lets you invite people to and schedule resources for meetings or events. You can schedule the date, time, and location for the meeting. You can use posted appointments to schedule personal events such as a doctor's appointment, a reminder to make a phone call at a certain time, and so forth. See Scheduling Appointments, Tasks, and Reminder Notes under Scheduling Group and Posted Items.

Task

A task lets you place a to-do item on your own or on another person's Tasks List. You can schedule a due date for the task and include a priority (such as A1). Uncompleted tasks are carried forward to the next day. See *Scheduling Appointments, Tasks, and Reminder Notes* under *Scheduling Group and Posted Items*.

Reminder Note

A reminder note is posted on a specific date on your own or another person's Calendar. You can use reminder notes to remind yourself or others of deadlines, holidays, days off, and so forth. Posted reminder notes are useful as reminders for birthdays, vacations, pay days, and so forth. See *Scheduling Appointments, Tasks, and Reminder Notes* under *Scheduling Group and Posted Items*.

Sending Mail Messages

A mail message is like an internal memorandum; it has a primary recipient, subject line, date, and can be carbon copied and blind copied to other users. You can also attach files, document references, sounds, movies, and OLE objects to your mail messages.

CC (Carbon Copy)

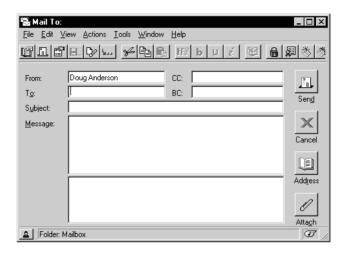
Sends copies of an item to users who would benefit from the information, but who are not directly responsible for the information or directions in it. All recipients can see that a carbon copy was sent.

BC (Blind Copy)

Sends a copy of your item to a recipient without the knowledge of any of the other recipients. Only the sender and the blind copy recipient know that a blind

copy was sent. When a recipient replies and chooses Reply to All, the blind copy recipient will not receive the reply.

Click on the toolbar.



- In the **To** box, type a username ▶ press **Enter**. Repeat for additional users. To select usernames from a list, click Address > double-click each user > click OK.
- 3 Type a subject.
- Type a message.
- Click Send.

Tips

- You can specify a different default mail view in Default Views Options. See Setting Options for GroupWise under Customizing GroupWise.
- You can specify many options, such as making a message a high priority, requesting a reply from the recipients, and more. See Setting Options for GroupWise under Customizing GroupWise.

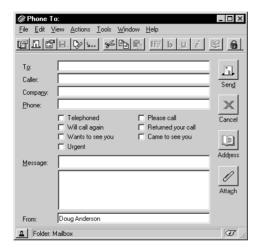
Sending Phone Messages

A phone message is a note you can send to notify other GroupWise users of calls they received while they were out of the office or unavailable. Phone messages are stored in the recipient's Mailbox.

Phone Message is simply a view, like a task or mail view. You cannot answer your phone from a phone message. Use Conversation Place to manage your telephone directly from the GroupWise desktop. See *Using Conversation Place* under *Using Your Phone with GroupWise*.

You can change the phone messages you receive into tasks, reminder notes, or other posted item views. This way, you can leave a record of the conversation on the date it was held (reminder note) or create a to-do item to complete at a later date (task). See *Changing Item Types* under *Working with Items in Your mailbox*.

1 Click File ► New ► Phone Message.



- **2** In the To box, type the user's name ▶ press Enter.
- **3** Type the name, company, and phone number of the caller.
- **4** Select the check boxes that apply to this phone message.
- **5** Type the message in the Message box.
- 6 Click Send.

Tips

• You can place a New Phone Message button on the toolbar. See *Customizing Your Toolbar* under *Customizing GroupWise*.

Spell-Checking Items You Send

Use Spell Checker to check the text for misspelled words, duplicate words, and certain capitalization errors. You can spell-check selected words or the entire message. While spell-checking, you can choose from the following options:

Replace

Replaces a misspelled word with a word Spell Checker suggests. To replace a misspelled word, double-click the word or click the word • Replace. To make your own corrections, edit the word in the Replace With box ▶ click Replace.

Skip Once

Skips the word one time. Spell Checker will stop the next time it encounters the word.

Skip Always

Skips every occurrence of the word throughout the document. Spell Checker ignores the word until the next time you spell-check.

bbA

Adds the word to the current user dictionary, which stores supplemental words so that Spell Checker can recognize the word in future spell-checks.

QuickCorrect

Defines an automatic replacement for a word or phrase. When Spell Checker stops on a word, click QuickCorrect to replace the word with the text in the Replace With box and add the replacement to the user word list QuickCorrect uses. Next time you type the word, QuickCorrect automatically replaces it.

Suggest

Displays additional words or phrases in the Replacements list box.

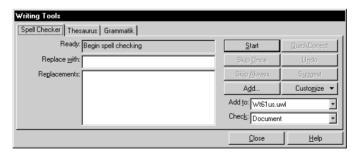
Spell-Checking an Item •

Click the **Subject** or **Message** box.

or

Select the text to spell-check.

Click Tools > Spell Check.



Click **Yes** when spell-checking is complete.

Spell-Checking Items Automatically

You can spell-check items automatically every time you click Send.

- Click Tools ▶ Options ▶ double-click Environment.
- Click Check Spelling Before Send ► OK.

Attaching Files

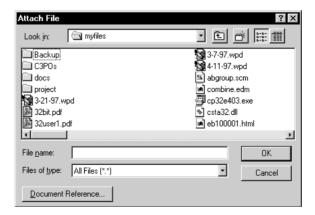
You can attach files and document references to mail messages, appointments, reminder notes, tasks, and phone messages. You can use Attach to send one or more files or document references to other users. For example, you may want to send an expense report to another user. You can attach a file that exists on your hard disk, diskette, or network drive. The recipients can open the attached file, save it, view it, or print it. If you change the attached file after you have sent it, the recipients will not see the changes.

If the file you want to attach is a document stored in GroupWise Library, you can attach a document reference. When a recipient opens the attachment, the document in the library will open if the recipient has rights to open or view the document and if the library is available. If any recipients do not have sufficient document rights, or if they are not using an e-mail product that supports GroupWise Library, or if the library is unavailable, only a copy of the document will open. If the recipient edits the copy, the changes will not affect the actual document in the library. For more information about document rights, see *Sharing Documents* under *Creating and Working with Documents*.

If you attempt to open or view an attached file that is password-protected, you must type the file's password. If you do not know the password, you cannot open or view the attached file.

Attaching a File to an Item

- 1 Click on the toolbar.
- 2 Fill in the To, Subject, and Message boxes.
- 3 Click Attach.



4 Click the file you want to send ► OK.
To attach several files, Ctrl+click other files before clicking OK.

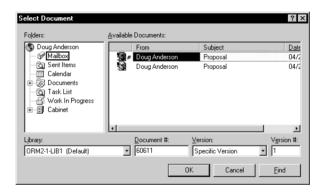
Click Send. 5

Tips

- The recipients will see a small paper clip icon mext to the item in their Mailboxes, indicating that the item has an attachment.
- Moving or deleting a file on a disk or network drive does not affect a file you've attached to an item and sent.

Attaching a Document Reference to an Item

- Click on the toolbar.
- Fill in the To, Subject, and Message boxes.
- Click Attach > Document Reference.



- Click the library where the document is stored.
- In the Document # box, type the document number. If you don't know the number of the document, click Find to locate the document in the library.
- In the Version drop-down list, click which version (current, official, or specific) you want to attach. If you select **Specific Version**, type the version number in the Version # box.
- Click OK ► Send. 7

Deleting an Attached File from an Item

Right-click the attachment you want to delete ▶ click Delete. 1

Tips

- If you delete an attached file, it is not erased from disk or network drive; it is simply removed from the attachment list.
- You can delete an attached file if you are the sender, but not if you are the recipient.

Viewing Attached Files

If you just want to quickly scan an attachment, you can view it instead of opening it. When you view an attachment, it is not opened in a separate application. Instead, it is displayed in a viewer. This is usually faster than opening the attachment; however, the attachment may not be formatted properly.

1 Right-click the attachment ► click View Attachment.

Tips

- If you cannot see an icon representing the attachment in your view, click File > Attachments > View.
- If the item you're reading contains several attachments, they appear as icons at the top of the Attachment Window. You can view the other attachments by clicking them.

Opening Attached Files

When you open an attached file, GroupWise determines the correct application to open the file in. You can accept the suggested application, or you can type the path and filename to another application. If you just want to scan the contents of the attachment, you can view it rather than open it. See *Viewing Attached Files*.

- **1** Open the item containing the attachment.
- 2 Right-click the attachment ► click Open.
- **3** If you want to open the attachment in a different application, type the path and executable filename.

This step may not be necessary if the correct application is already listed.

4 Click OK.

Tips

• If you cannot see an icon representing the attachment in your view, click File • Attachments • Open.

Attaching Sound Files to an Item

You can add voice or digitally recorded sound files to an item. For example, you might dictate a letter and have the recipient listen to the dictation and type the letter. However, to annotate an item with sound, you must have the appropriate hardware and software drivers installed.

1 In an item view, drag from the status bar onto any area of the view outside of the boxes.

- Click the circle to begin recording the sound.
- Click the square to stop the recording.
- Click File Exit & Return to GroupWise.

Managing Sent Items

You can display items in your Mailbox that you have previously sent. A few reasons you may want to display items you've sent are listed below:

You can read a message you sent to make sure you included correct information or to remind yourself of what you wrote.

Resend

You can resend an item a second time, perhaps with corrections or to other users who didn't originally receive the item.

Track the Status (Properties)

You can see who received the item, who opened it, who deleted it, and more.

If you realize you made a mistake, and you already sent the item, you may be able to retract it before the recipients read it.

Displaying Items You've Sent

- 1 If your toolbar is not already displayed, click View > Toolbar.
- Click **Sent Items** on the display settings drop-down list.

Tips

To display both received and sent items, click All Items on the display settings drop-down list.

Confirming Delivery of Items You've Sent

GroupWise provides several ways for you to confirm that your item was delivered.

Track an Item You Sent

You can check the status in the Properties window of any item you've sent. Right-click the item • click Properties. The Properties window shows you when the item was delivered and opened, in addition to other information.

Receive Notification When the Item is Opened or Deleted

You can receive notification when the recipient opens or deletes a message, declines an appointment, or completes a task. While composing a message, click File > Properties > the Status Tracking tab > the When Opened or When

Deleted Return Notification pop-up list ▶ select how you want to receive notification.

Request a Reply

You can inform the recipient of an item that you need a reply. GroupWise adds a sentence to the item stating that a reply is requested and changes the icon in the recipient's Mailbox to a double arrow. While composing an item, click File Properties > Reply Requested > select how soon you want the reply in the Reply Requested box.

Resending Items

Use Resend to send an item a second time, perhaps with corrections. Resend lets you send an item without re-typing all the information.

When you resend an item, you can retract the original item. Mail and phone messages cannot be retracted if they've already been opened. Appointments, reminder notes, and tasks can be retracted at any time.

- 1 Click Sent Items on the display settings drop-down list on the toolbar.
- **2** Right-click the item you wish to resend ▶ click **Resend**.
- **3** Make any changes to the item, if necessary ▶ click **Send**.
- 4 Click Yes to retract the original item.

or

Click No to leave the original item.

Tips

• You can check the Properties of the original item to see if GroupWise was able to retract it. If Properties does not list Retracted, the item has already been opened.

Retracting Items You've Sent

Use Delete to retract an item you sent. For example, if you realize you made a mistake after you sent an item, you may want to delete it before the recipients read the item.

- 1 To display sent items in your Mailbox, click **Sent Items** on the display settings drop-down list on the toolbar.
- **2** Click the item in your Mailbox that you want to retract.
- 3 Click Edit ► Delete.
- 4 Click the appropriate option.

5 Click **OK**.

Tips

- You can retract a mail or phone message from those recipients who haven't vet opened the item. You can retract an appointment, reminder note, or task even if it has been opened. Internet messages cannot be retracted.
- To see which recipients have opened your message, right-click the item in the Mailbox • click Properties.

Checking the Status of Your Items

Properties lets you check the status of any item you've sent. For example, you can see when an item was delivered and when the recipient opened or deleted the item. If a recipient accepted or declined an appointment and included a comment, you'll see the comment in the Properties window. You'll also see if a recipient marked a task Completed.

Properties also shows information about items you receive. You can see who else received the item (except for blind copy recipients), the size and creation date of attached files, and more. For information about a document, use the Activity Log in Properties. See Viewing the History of a Document under Creating and Working with Documents.

- Click or open the item for which you want to check the status.
- Click File > Properties.

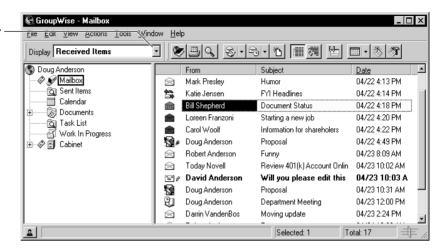
Tips

- You can also right-click an item in your Mailbox, then click **Properties** to see the status information.
- The icons next to an item can give you helpful status information too. See A Brief Tour of GroupWise under Getting Started.

Managing Received Items

GroupWise stores all the items, mail messages, appointments, and so on, you receive in your Mailbox.

Click Received Items on the display settings drop-down list.



From your Mailbox, you can read items, reply to items, and forward items you've received. In addition, you can delegate tasks and appointments to other users. You can even change an item, such as a mail message, to another type of item, such as an appointment.

Reading Items You Receive

You can read incoming items in your Mailbox or Calendar. Your Mailbox displays a list of all of the items you have received from other users. Posted appointments, reminder notes, and tasks appear in your Calendar, not in your Mailbox.

You can open and read all types of new items in your Mailbox. However, you may want to read appointments, tasks, and reminder notes in your Calendar so you can view new messages while looking at your schedule. Phone and mail messages stay in your Mailbox until you delete them. Appointments, reminder notes, and tasks stay in your Mailbox until you accept, decline, or delete them. When you accept an appointment, reminder note, or task, it no longer appears in your Mailbox; it appears only in your Calendar.

All Mailbox items are marked with an icon. The following table includes each icon that displays in your Mailbox. The icons change depending on whether or not the item has been opened.

Item Type	Unopened	Opened
Mail Message	="	
Phone Message		

Item Type	Unopened	Opened
Task	9	3
Appointment	⊗	81
Reminder Note	1=	1 <u>-</u>

In addition, all unopened items in your Mailbox are bolded to help you easily identify which items and documents you have not yet read. This is especially useful for collapsed discussion threads because it saves you the time of expanding each thread to check if there are newly posted items.

Reading Items in Your Mailbox

Double-click the item you want to read.

Tips

• If your Mailbox is not displayed, click win your Folder List.

Reading Items in the QuickViewer

Use the QuickViewer to scan the contents of your items. The QuickViewer saves time because you don't need to open each item; you simply click an item or press the Down-arrow to read your items. If you click a document reference, the document will display in the QuickViewer. You can display an item's attachment by clicking the attachment in the drop-down list on the QuickViewer toolbar. OLE attachments do not display in the QuickViewer.

When you read an item in the QuickViewer, the icon changes to the opened status. For example, the closed envelope representing a mail message changes to an opened envelope.

1 Click on the toolbar.



2 Size the QuickViewer by dragging a corner of the window or by dragging the horizontal dividing line up or down.

If you size and close the QuickViewer, it will be the same size when you open it again. Size it by dragging a corner of the window, not by clicking the maximize button.

3 In the Mailbox, click each item that you want to read.

Tips

- To close the QuickViewer, repeat Step 1 above.
- Right-click in the QuickViewer window to choose other options such as Print.
- Open the QuickViewer and maximize GroupWise to increase the size of an item.

Marking an Item Unread

If you open an item to read it, but decide you want to read the item later, you can mark the item unread. Marking the item unread changes the item to bold and changes the item's icon to unopened so you will know you still need to read the item.

1 In the Main Window, click the item in the Item List.

Click Actions ▶ Read Later.

Tips

Marking an item you have opened unread does not change the status of the item in Properties. For example, if you have opened an item, then marked the item unread, the sender of the item still sees the item status as opened in the Properties window.

Replying to Items You Receive

Use Reply to respond to an item. You can reply to everyone who received the original item or to the sender only, without having to create and address a new message. You can also include a copy of the original message in your reply. Your reply will include Re: preceding the original subject text. You can modify the subject text if you want.

Replying to an Item

- Open or click the item you want to reply to.
- Click Actions ► Reply.



3 Click Reply to Sender.

Click Reply to All (Sender and Recipients).

- Click **OK**.
- Type your message ▶ click **Send**.

Tips

If you reply to all recipients of an item and the original message included BC or CC recipients, your reply will include the CC recipients, but not the BC recipients.

Including the Message Text in a Reply

- 1 Open the item you want to reply to.
- 2 Click Reply.
- 3 Click Include Message Received from Sender ► OK.
- **4** Type your message ▶ click **Send**.

Tips

• Sometimes you may like to mix your comments with the included text to maintain a conversational flow. In this case, you may want to bold, underline, or italicize your text to differentiate it from the original text. Select your text ▶ click Edit ▶ Font ▶ an option.

Replying to an Item in a Shared Folder

When you reply to an item in a shared folder, you have two additional reply options. If you are reading someone else's reply, you can choose to reply to the original discussion topic, rather than to the item you are reading. Or, you can reply to any item you are reading, whether it's an original discussion topic or someone else's reply. In either case, these replies are posted in the shared folder rather than sent to individuals.

- 1 Open or select an item in the shared folder.
- 2 Click Actions ► Reply.



- **4** Type your reply ► **OK**.

Tips

• Unless you choose a Reply Privately option, your reply is posted in the shared folder rather than sent to individuals.

Forwarding Items to Other Users

When you receive a message, appointment, or task, you can forward it to other users. You can also forward a document reference. For example, if you are no longer the chairperson of a committee but you are still receiving mail messages related to the committee's business, you can forward the items you receive to the new chairperson.

When you forward an item, it is sent as an attachment to a mail message. The mail message includes your name and any additional comments you have made.

If you receive an appointment, reminder note, or task that you want to assign to another user, use Delegate. When you delegate an item, the sender of the item receives notification that responsibility for the item has been assigned to another user.

- Click the item you want to forward in your Mailbox.
- Click Actions ➤ Forward.
- Type a username in the **To** box ▶ press **Enter**. Click **Address** if you want to search for a username in the Address Book. Double-click the username ▶ click OK.
- Click in the **Message** box, then type a message (optional).
- Click Send.

Tips

If you can't accept an appointment, task, or reminder note, you can delegate the item instead of forwarding it. Delegating places a delegated status in the sender's Properties window, letting the sender know you have transferred responsibility for the item to another person.

Changing Item Types

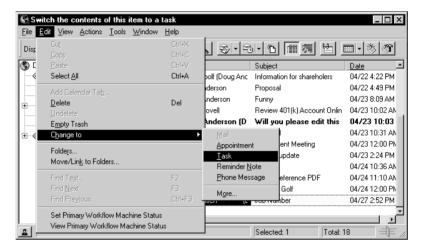
You can use Change To to convert an item in your Mailbox to another type of item. For example you can change a mail message in your Mailbox to an appointment in your Calendar. The new appointment contains all the information from the mail message (such as To, CC, and BC lists, subject, and message text) that is applicable in the appointment. By default, all new items created using Change To are posted items; however, you can change a posted item to a group item in the Change To dialog box.

When you change a mail or phone message to another type of item (such as an appointment or task), the original item is removed from your Mailbox and the new item is added in the appropriate location, such as the Calendar.

When you change an item, GroupWise displays the default item view selected in Environment Options.

Changing an Item in Your Mailbox to Another Type of Item

- 1 In your Mailbox, click the item you want to change.
- 2 Click Edit ► Change To.



- **3** Click an item type.
- **4** Type the necessary information.
- 5 Click Post.

Tips

• You can right-click the item ▶ click **Change To** to change the selected item from a posted item to a group item or vice versa.

Changing an Item in Your Calendar to Another Type of Item

- 1 Click Window Calendar to open your Calendar.
- 2 Click the item you want to change in the Appointments, Tasks, or Reminder Notes List.
- 3 Drag the item to the list that corresponds to the type of item you want to change it to.

For example, drag a task to the Appointments List to change it to an appointment.

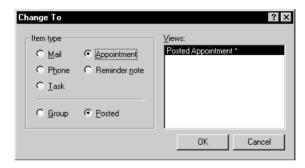
Specify any additional information in the item view ▶ click Post.

Tips

You can also press Ctrl while you drag the item to copy it.

Changing a Posted Item to a Group Item

- In your Calendar, click a posted item.
- Click Edit ► Change To ► More.



- 3 Click Group ► OK.
- Type any additional information ▶ click Send.

Delegating Items

Use Delegate if you receive appointments, tasks, and so forth that you can't accept. For example, you may receive an appointment for a meeting about something you no longer have responsibility for. Instead of declining the appointment, you can delegate it. You can delegate appointments, tasks, or reminder notes. The sender can find out who you delegated the item to in the item's Properties window.

- In the Main Window or your Calendar, click a task, reminder note, or appointment.
- Click Actions ► Delegate.
- Type a username ▶ press Enter ▶ click Address if you want to search for a username in the Address Book ▶ double-click the username ▶ click OK.
- Type any additional comments to the recipient.
- 5 Click Send.
- Click Yes if you want this item to remain in your Calendar.

or

Click **No** if you want this item deleted from your Calendar.

Receiving Items That Are Written in HTML

If you open an item that has been composed in HTML, you are opening a live browser. While you cannot perform an independent web search, you can click on any links that are included in the message and jump to the linked web sites.

Moving within an HTML Message

1 To move back to the previously displayed page, click HTML ▶ Back.

or

To move forward to the next previously displayed page, click HTML > Forward.

or

To move to the first page of the message, click HTML • Message Home.

Opening Your Browser from an HTML Message

1 Click HTML ► Browse This Page.

Tips

• If you are viewing a message or attachment that is a page on the Web, your default browser will open to the same page that you are currently viewing in GroupWise. Once you have opened the page in your browser, you can bookmark it or add it to your list of favorite web sites. If the page is not on the Web, this option is not available.

Running a Script

An HTML message may contain a script, such as one composed in JavaScript or VBScript. You will be prompted before the script is run to see if you really want it to be run. You should never run a script from someone you don't know or don't trust. A malicious script could damage your messages or impersonate you and send messages in your name.

Each time you run a script, you can add the username to a Trusted List of known users. If you receive a script from a user who is on the Trusted List, you will not be prompted before the script is run.

To view who you have selected to run scripts from,

1 In an HTML message, click HTML ▶ Security.

Turning Off HTML Support in an HTML Message

1 Click HTML ► View as Text Message.

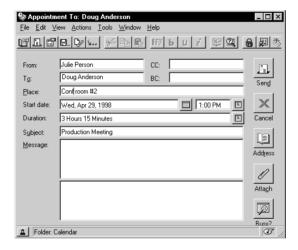
Scheduling Group and Posted Items

Scheduling Appointments, Tasks, and Reminder Notes

Scheduling appointments, tasks, and reminder notes with GroupWise® is convenient. You can use Busy Search to check for a time when all the people and resources you want for a meeting are available. You can use Auto-Date to schedule recurring appointments, tasks, or reminder notes quickly and easily. See *Scheduling Recurring Appointments* under *Scheduling Group and Posted Items* for Auto-Date information. You can also reserve a block of time with a posted appointment. If you want to find out whether someone accepted a task or is coming to your meeting, you can check for an accepted or declined status.

Scheduling an Appointment

1 Click on the toolbar.



- 2 In the To, CC, and BC boxes, type the names of the people to invite. In addition, include any resource IDs in the To box. If you do not know a resource ID, click Address ► double-click the resource ► click OK.
- **3** Type the place description in the **Place** box.
- **4** Specify the start date, start time, and duration.
- **5** Type a subject and message.
- Click Send.

- If you select a location resource in the Address Book, its description is displayed in the Place box and its ID in the To box.
- If you want to make sure the people and resources for the meeting are available, you can do a Busy Search. See *Checking When Everyone Is Available* later in this section.

Rescheduling an **Appointment**

- 1 Click Sent Items on the display settings drop-down list if your Mailbox is not displaying outgoing items.
- Click the appointment to reschedule.
- 3 Click Actions ► Resend.
- Make your changes ▶ click **Send**.
- Click Yes to retract the original item.

Tips

- You can reschedule an appointment if you scheduled the original appointment or if you have the necessary Proxy rights to the scheduler's Mailbox.
- To reschedule an appointment for a new time on the same day, open your Calendar and drag the appointment to the new time.
- If the original appointment was an auto-date appointment, after you click Actions • Resend you are prompted to click This Instance or All Instances. Click This Instance to reschedule only the appointment you selected, or click All Instances to reschedule all the appointments included in the auto-date.

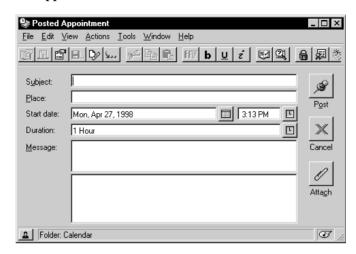
Canceling an **Appointment**

- Click Sent Items on the display settings drop-down list if your Mailbox is not displaying outgoing items.
- Click the appointment you want to cancel.
- 3 Click Edit ▶ Delete.
- Click All Mailboxes ► OK.

- You can cancel an appointment if you scheduled it or if you have the necessary Proxy rights to the scheduler's Mailbox.
- If the original appointment was an auto-date appointment, after you click Actions • Resend you are prompted to click This Instance or All Instances. Click This Instance to reschedule only the appointment you selected, or click All Instances to reschedule all the appointments included in the auto-date.
- For help on a dialog box option, click the option.

Scheduling a Posted Appointment

1 On the toolbar, click the arrow on the right of Folick Posted Appointment. ▶ click Posted

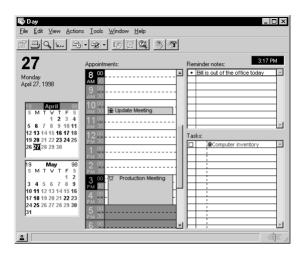


- **2** Type a subject, a place (optional), and a message (optional).
- **3** Specify the start date, start time, and duration.
- 4 Click Post.

- If you are working toward a deadline, are on vacation, or are otherwise not available for meetings, schedule a posted appointment for those times. When another user includes you in an appointment and does a Busy Search, the user can see you are not available at those times.
- You can specify a Show Appointment As type for your appointment that will display availability information in Busy Search and in your Calendar. Right-click the appointment ► click Show Appointment As ► Free, Tentative, Busy, or Out of Office. Free means the appointment will appear on your Calendar, but will not be marked as Busy in Busy Search.
- A posted appointment view has no To, CC, or BC boxes. The posted appointment is automatically placed in your Calendar.
- Duration can be in minutes, hours, or days. If you are going on a two-week vacation, you can schedule one posted appointment with a duration of 14 days to cover the entire period.
- For both group and posted appointments, being scheduled for a
 certain period does not prevent you from being scheduled for
 another appointment at the same time; it simply creates a scheduling
 conflict. Users who do a busy search will want to avoid doublebooking you, but they can if they choose to.

Scheduling a Posted Appointment from the Calendar

1 Click Window ► Calendar.



- 2 Click the date you want ▶ double-click the time in the Appointments List.
- **3** Type a subject, a place (optional), and a message (optional).
- **4** Specify the duration ▶ click **Post**.

Tips

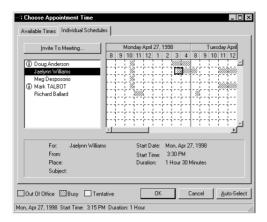
 A posted appointment view has no To, CC, or BC boxes. The appointment is automatically placed in your Calendar.

Checking When Everyone Is Available

Use Busy Search to find a time when all the people and resources you want to schedule for a meeting are available. You can use Busy Search in GroupWise Remote.

- 1 In an appointment you are creating, specify usernames and resource IDs in the To box. If you don't know the usernames or resource IDs, click Address.
- 2 Specify the first possible day for the meeting in the Start Date box.
- **3** Specify the meeting's duration.

4 Click Busy.



An empty space across from the username or resource on the Individual Schedules tab means that user or resource is available (Free) for that time. An empty space across from a time on the Available Times tab means that no users are scheduled for that time.

5 Click Auto-Select to select the first available meeting time or click Auto-Select until the time you want is displayed ▶ click OK to transfer the users, resources, and selected time and duration back to the appointment you were scheduling.

or

Click the **Available Times** tab to see possible meeting times • click a time to select it • click **OK** to transfer the users, resources, and selected time and duration back to the appointment you were scheduling.

Complete and send the appointment.

Tips

- If (1) appears to the left of the username or resource, you can click a scheduled time across from the username or resource on the Individual Schedules tab to display more information about the appointment in the box below. However, the user or resource owner must give you appointment Read rights in the Access List first.
- To remove a user or resource from the Invite to Meeting list after the search, click the Available Times tab • click the username or resource to remove ▶ press Delete ▶ click Yes. This is useful if you include several conference rooms in the search to find one that is available and then eliminate those you do not want.
- To exclude a username or resource from the search without removing it from the To box, click the Available Times tab ▶ deselect the check box next to the user or resource to exclude. Excluding a person or resource from the search is useful if a user (like a CC recipient) should be invited to a meeting but does not necessarily need to attend. To include a user or resource name that has been excluded, select the check box next to the user or resource.
- If you click a scheduled time on the Available Times tab, a crosshatched box is displayed next to the users in the Invite to Meeting list who are already scheduled for that time.
- If you want to do a busy search before opening an appointment, click **Tools** • **Busy Search**. Specify information in the Busy Search dialog box ► click **OK** to perform a busy search. When you find a time you want for a meeting, click Request Meeting to transfer the information to a new appointment view, then complete the appointment.
- You can change the search range for one appointment by scheduling the appointment with Tools • Busy Search and changing the number in the Number of Days to Search box. You can change the search range, time, and days default for all appointments on the Busy Search tab in Date Time Options.
- Free, Tentative, Busy and Out of Office are Show Appointment As types or levels of availability that affect the way an appointment is displayed in Busy Search and in users' Calendars. If an appointment is marked Free, it appears on the user's Calendar, but is not marked as Busy in Busy Search.
- For help on a dialog box option, click ! the option.

Sending Tasks

A task is an item to be completed by a specified date and time which you can assign to yourself, another GroupWise user, or a group of users.

For example, if you have assigned someone to write a report that is due next week, you can assign the report to that user as a task. The user can accept or decline the task, but until it is declined or completed, the task appears on the user's Tasks List each day.

Once it is accepted, a task appears on the Calendar on its start date. When the due date is past, the task displays in red on the Calendar. When you mark a task Completed, it no longer carries over to the next day on your Calendar.

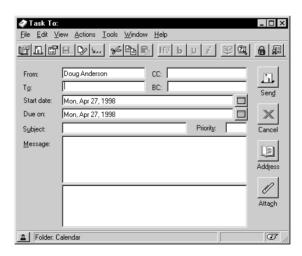
Once you finish a task, you can mark it Completed. As the originator of an assigned task, you can have GroupWise send you notification when the task is marked Completed. (You must have Notify installed to receive notification). A Completed status, including the date and time the task was marked Completed, is placed in the Properties window.

Assigning a Task to Another User

When you assign a task to another user, a copy of the task appears in your Mailbox. You can assign an optional priority level to a task. There are two levels of priority: alphabetical and numeric. For example, tasks may have priorities such as A, A1, A2, B, B1, 1, 2, and so forth.

In addition to the priority level, you can assign a send priority (high, standard, or low) in Send Options. The send priority determines how the task displays in the recipient's Mailbox. For example, if you assign a task a send priority of high, the task icon is red in the recipient's Mailbox.

1 Click on the toolbar.



- **2** Type the name of the person you want to assign the task to.
- **3** Type the date you want the task to begin.
- **4** Type the date you want the task to be completed.
- **5** Type the subject.

- Type a priority for the task.
- Type a description of the task.
- Click Send.

Assigning a Task to Yourself

Click the arrow on the right of on the toolbar ► click Posted Task.



- Type a subject.
- Type a priority for the task.
- Type a starting date.
- Type a due date.
- Type a message.
- Click OK.

Tips

- You can also specify starting dates and due dates using the Set Date buttons to the right of the Start Date and Due On boxes.
- Posted tasks are placed in your Calendar. They are not placed in your Mailbox, or in any other user's Mailbox.

Marking Tasks Completed

When you finish a task, you can mark it Completed. Tasks you mark Completed are not carried over to the next day on your Calendar. Completed tasks are distinguished by a check mark in your Calendar. Overdue tasks display in red.

If you mark a task Completed, then realize you left some part of it incomplete, you can unmark it. Unmarked tasks display on the current day in your Calendar.

When you mark a task Completed, GroupWise sends notification to the originator of the task if he or she selected return notification in Send Options. A Completed status, including the date and time the task was marked Completed, is placed in the originator's Properties window.

Marking a Task Completed •

- 1 Click Window ▶ Calendar.
- 2 Select the check box next to the task.
 To unmark a task that has been marked Completed, deselect the marked check box next to the task.

Checking the Completion Status of a Task •

- 1 Click Sent Items on the display settings drop-down list.
- **2** Click the task you want to check the status of.
- 3 Click File ▶ Properties.

Sending Reminder Notes

A reminder note is an item that you post on a specific date on your own or another person's Calendar. You can use reminder notes to remind yourself or others of deadlines, holidays, days off, and so forth. Posted reminder notes are useful as reminders for birthdays, vacations, pay days, and so forth.

Writing a Posted Reminder Note

1 From your Calendar, open a view with a Reminder Notes List (for example, the Day view).

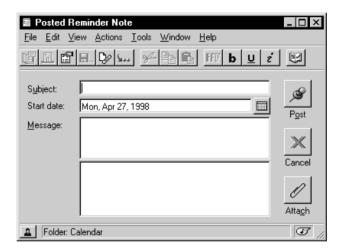


- 2 Click the date you want the reminder note to appear ▶ double-click an empty space in the Reminder Notes List.
- Type in a subject and message.
- Click Post.

To access the information later, open your Calendar and select the date the information appears on. Double-click the reminder note in the Reminder Notes List.

Sending a Reminder Note to Other Users

Click File ▶ New ▶ Reminder Note.

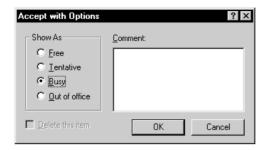


- Fill in the To, CC, and BC boxes. If you don't know a username, click Address.
- In the **Start Date** box, type the date this reminder note should appear in the recipients' Calendars.
- Type a subject (optional) and the reminder note message.
- 5 Click Send.

Accepting or Declining Scheduled Items

When you receive an appointment, task, or reminder note, you may or may not be able to accept. In GroupWise, you can let the sender know if you accept or decline, specify a level of acceptance or availability, and add additional comments. You can also delegate the item to another user. The sender can find your response by checking the item status.

- **1** Double-click the item in the Mailbox to open it.
- 2 Click Accept or Decline.
- **3** If you accepted, select a Show As level of availability.



- **4** Type a comment (optional) ▶ click **OK**.
- **5** If the item is an Auto-Date item, you are prompted after you accept or decline. Click **This Instance** to accept or decline this one Auto-Date item. Click **All Instances** to accept or decline all instances of the Auto-Date item.

 As the owner of a resource, you can accept or decline requests for the resource. The owner of a resource can also use Rules to automatically reply to resource requests. See *Creating Rules* under *Managing Your Mailbox*.

Specifying a Time Zone for an Appointment

The Time Zone feature lets you schedule a meeting for recipients in different time zones who will be meeting in a single location.

Normally, GroupWise automatically adjusts meeting times based on the recipients' time zones. For example, a meeting scheduled by a user in Utah for 10:00 would be displayed as 9:00 for a recipient in California and as 12:00 for a user in New York because these users are in different time zones. Because GroupWise adjusts the time, all the users scheduled for a conference call would call in at the same moment, even though their local time may differ.

Use the Time Zone feature if you don't want GroupWise to adjust to the recipients' local time zone. For example, if you are in the Saskatchewan time zone and include users from the Mountain Time (US & Canada) time zone in your appointment, you would use the Time Zone feature if these users are flying to Saskatchewan for the appointment. Time Zone ensures that the appointment in their Calendars and Mailboxes shows the correct Saskatchewan time.

1 Click on the toolbar.

- **2** Fill in the **To**, **CC**, and **BC** boxes with the names of users or resources to be included in the appointment.
- **3** Specify the place, subject, and message in the appropriate boxes.
- **4** Click **Actions** ► **Select Time Zone** ► click the **Time Zone** drop-down list and select the time zone for the appointment location ► click **OK**.



- **5** Specify the start date, start time, and duration of the appointment.
- Click Send.

• When the users you have scheduled with the Time Zone feature receive the appointment, they will see a time annotation after the subject when they see the appointment in their Mailboxes. For example, if the subject of the meeting is "Marketing Conference" and the time zone is Saskatchewan, users would see a subject and time annotation similar to the following: Marketing Conference (Saskatchewan). In the users' Calendars, the place is annotated with the time zone, rather than the subject.

Scheduling Recurring Appointments

Use Auto-Date to schedule recurring appointments, tasks, and reminder notes. For example, if you were responsible for scheduling a department meeting every other week, you could create one auto-date appointment that would schedule the meeting for the entire year. You could also reserve a room and projector with the same appointment.

Auto-Dates can occur on the same day every week (for example, every Monday), the same day(s) of the month (for example, the 15th and last day), or any other defined series of dates. You can also use Auto-Date to schedule irregular or infrequent events, such as holidays.

When you send an auto-date item, GroupWise copies the item and places one of the defined dates in each copy of the item. For example, if you define five dates for the event, GroupWise makes five copies of the item and schedules one copy for each date. If you were to send the item to other users, you would have five outgoing items with a five-occurrence auto-date. If you were to receive the event, you would find five copies of the incoming item in your Mailbox, each scheduled for a different date.

You can create an auto-date three ways. Example lets you schedule events on the same day every week, the same day each month, or periodically. Dates lets you select specific days from a year calendar. Formula lets you enter the scheduling information in text format.

Scheduling Auto-Dates by Dates

- 1 In an item you are scheduling, click Actions ▶ Auto-Date.
- **2** Click the days to schedule ► click **OK**.

Tips

- Use the Dates tab to schedule an item on specific dates on a year calendar. The Dates tab is useful when you are scheduling events that don't occur regularly, like holidays.
- To move to a different year, click the year button ▶ type the new year ▶ click OK.
- To clear the Auto-Date dialog box, click Reset.

Scheduling Auto-Dates by Example

- In an appointment, task, or reminder note you are scheduling, click Actions
 Auto-Date.
- **2** Click the **Example** tab.

3 In the Range group box, specify the starting date and ending date.

or

To specify a certain number of occurrences rather than a range, specify the starting date • click the End drop-down list • Occurrences • specify the number of occurrences.

- **4** Click the **Days of the Week** drop-down list ▶ click an option.
- **5** Click the months to schedule. To schedule all of the months, double-click any month.
- 6 If you clicked Days of the Month, click the On drop-down list ► an option ► click the numbered days to schedule (for example, 1 and 15).

or

If you clicked Days of the Week, click the ordinal number across from the day of the week to schedule (for example, 2nd Tue).

or

If you clicked Periodic, specify a period length (for example, every 15 days).

Click OK.

Tips

- Use Example or Formula to schedule events that occur on the same day of the week (for example, every Monday), the same day(s) of the month (for example, the 15th and last day), or in a defined period of time (for example, every 14 days).
- If you have been using Formula or Dates and decide to change to Example, click the Example tab.
- To clear the Auto-Date dialog box, click Reset.
- To verify that you scheduled the correct dates, click the Dates tab.
 The dates you scheduled in the Example tab are selected in the calendars. If you want to deselect any occurrence, click the days you want to deselect on the Dates tab ► click OK.

Scheduling Offset Days of the Week

Use Offset Days to schedule an appointment, reminder note, or task a specified number of days prior to or after a specified day of the week.

- In an appointment, task, or reminder note you are scheduling, click Actions
 Auto-Date.
- 2 Click the Example tab.
- **3** In the Range group box, specify the starting date and ending date.

- 4 Click the months you want to include. To include all months, double-click any month in the Months group box.
- **5** Click a day of the week (for example, Wed).
- **6** Specify the number of days to offset ► click **OK**.
- 7 Click one or more ordinal numbers in the row across from the selected day of the week (for example, 1st, 3rd, and Last in the Wed row).
 - To include all of the options, double-click any option in the row.
- 8 Click OK.

 As an example, you might need to schedule a meeting on the Monday following the first Sunday of each month (which may or may not be the first Monday of the month). To do so, open the Auto-Date dialog box ► click Days Of the Week ► click 1st in the Sunday row ► click the Sunday button ► type 1 ► click OK twice.

Scheduling Offset Days of the Month

Use Offset Days to schedule an appointment, reminder note, or task a specified number of days prior to or after a specified day of the month.

- In an appointment, task, or reminder note you are scheduling, click Actions
 Auto-Date.
- 2 Click the Example tab.
- **3** In the Range group box, specify the starting date and ending date.
- 4 Click the months you want to include.
 To include all months, double-click any month in the Months group box.
- 5 Click the Days of the Week pop-up list ▶ Days of the Month.
- 6 Click one or more days of the week (for example, Mon, Wed, and Fri). To include all days, double-click any day in the group box.
- 7 Click Last ► click the Last button.

Specify the number of days to offset ► click **OK** twice.

Tips

- Here's an example of how you could use offset days of the month. If you want a reminder note to appear in your Reminder Notes List the 2nd to the last day of each month, type -1 in Step 8 above ▶ click OK.
- To verify that you scheduled the correct dates, click the **Dates** tab. The dates you scheduled in the Example tab are selected in the calendar.

Scheduling Auto-Dates by Formula

- In an appointment, task, or reminder note you are scheduling, click Actions Auto-Date.
- Click the Formula tab.
- 3 In the Range group box, specify the starting date and ending date.

To specify a certain number of occurrences rather than a range, specify the starting date ► click the End drop-down list ► Occurrences ► specify the number of occurrences.

Type the formula text ► click **OK**.

- Use Example or Formula to schedule events that occur on the same day each week (for example, every Monday), the same day each month (for example, the 15th and last day), or in a defined period of time (for example, every 14 days).
- For information on how to enter formula text, see *Using Auto-Date* Formula Functions and Operators later in this section.
- For additional examples later, create an auto-date using Example click the **Formula** tab.
- Formula uses the same syntax as WordPerfect® Office® 3.1.
- To clear the Auto-Date dialog box, click **Reset**.
- To verify that you have scheduled the correct days, click the **Dates** tab. The days you scheduled are selected in the calendar. If you want to deselect any occurrence, click the day you want to deselect on the Dates tab ► click OK.

Using Auto-Date Formula Functions and Operators

You can use functions and operators to create an auto-date formula. Keep in mind that you can create the same kind of auto-dates easily and quickly with the Example tab. Formulas are provided for continuity and for those people who prefer them.

Auto-Date Formula Operators

An operator is a character or word you insert in a formula to perform a specific operation. Each operator is assigned a priority, meaning that when a formula is evaluated, some operations are performed before others.

You can use grouping operators to group operators according to their priorities. The table below lists operators and their priorities. Additional details about the operators are provided following the table.

Function	Priority
A blank space (high-priority And)	1
Plus or +	2
Minus or -	2
To or:	3
EveryStarting	4
EveryEnding	4
Before	5
On/Before	5
After	5
On/After	5
Near	5
Near/After	5
Or or,	6
Not o	!
And or & (low-priority And)	7

Grouping Operators • Use parentheses as grouping operators to change the priority of operators or to group functions together for clarification.

For example, because the high-priority And operator (a space) has a higher priority than the Or operator (a comma), the formula below means that all scheduled days must fall on a Tuesday or must fall on a Thursday and be in the month of July or must be in the month of August.

tue,thu jul,aug

In other words, the formula is performed as if parentheses were inserted as follows:

(tue,thu) (jul,aug)

Now examine the following formula:

(tue),(thu jul),(aug)

This formula would schedule all Tuesdays, all Thursdays in the month of July, and all days in the months of August. Notice how the meaning changes when parentheses are included as in the formula below.

(tue,thu) (jul,aug)

With the above formula, all scheduled days must fall on a Tuesday or Thursday and must be in the month of July or August. The end result is that only Tuesdays and Thursdays in July and August are scheduled.

High-Priority And • A space between two functions acts as an And operator, meaning that both functions must hold true. For example, 25 means the 25th day of all months in all years. But 25 oct means that all scheduled days must fall on the 25th day of the month and must be in October. And 25 oct 1998 means that all scheduled days must fall on the 25th day of the month and must be in October and must be in the year 1998.

Offset Operators • You can use a positive offset operator (+ or the word PLUS) or a negative offset operator (- or the word MINUS) to add a relative offset to a function or statement.

For example, to schedule an event three days before the first Thursday in February for all years, you could enter the following formula:

thu(1) feb-3

Range • The range operator (: or to) functions like a series of Or operators (see *Or* in this section) between each item (day, month, etc.) in the range. For example, if you want to schedule the 15th of every month, but only if the 15th is a weekday, you could enter either of the following formulas:

15&mon:fri

15(mon:fri)

This formula means that all scheduled days must fall on the 15th of the month and must be a day from Monday to Friday. Another way of describing the formula is that all scheduled days must fall on the 15th of the month and must be a Monday or Tuesday or Wednesday or Thursday or Friday.

Periodic Operators • The three periodic operators are Every, Starting, and Ending. Use Every in combination with Starting and/or Ending to schedule days at regular intervals, beginning on a specific date and/or ending on a specific date. For example, suppose you want to schedule a meeting for once a week starting on March 3, 1998 and continuing through June 11, 1998. You could use the following formula:

every 7 starting mar 3 1998 ending jun 11 1998

The formula will schedule every seventh day starting with March 3, 1998 and ending with June 11, 1998. The starting date is always scheduled as the

first day and the ending date is scheduled only if it naturally falls at the Every interval. If you do not use both the Starting and Ending operators, the starting or ending date is the first or last date in the Calendar file.

For example, examine the following formula:

every 7 starting mar 3 1998

The above formula schedules every seventh day starting on March 3, 1998 and continuing to the last date in the Calendar file. The Every command will work with numbers up to 30. For example, "every 45 starting mar 3 1998" is not a valid formula.

Relative Operators • The six relative operators are Before, On/Before, After, On/After, Near, and On/Near. Use these operators to schedule days relative to a specific date. For example, to schedule the Monday closest to November 6 in all years, you could enter the following formula:

mon on/near nov 6

If you need to schedule the first Tuesday after November 6, 1998, you could enter the following formula:

tue after nov 6 1998

Or • You can use the Or operator (, or the word Or) to indicate that one or the other function or statement must hold true in order to schedule days.

For example, to schedule an appointment on the 15th day of each month in the year 1998, but only if the 15th falls on a Tuesday or Thursday, enter the following formula:

15 1998 (tue,thu)

Not • When placed before a function, the Not operator ▶ or the word not) negates that function.

For example, if you want to schedule all days in January, 1998 except for Tuesdays and Thursdays, you could use the following formula:

jan 1998 !tue !thu

Low-Priority And • Like a space, the low-priority And operator (& or the word And) between two functions indicates that both functions must hold true. However, the low-priority And has the lowest priority of all operators.

For example, examine the following formula:

tue,thu jul,aug

This means that scheduled days must be a Tuesday or must be a Thursday and must be in July or must be in August. However, suppose you were to substitute the high-priority And (a space) with a low-priority And, as in the following formula:

tue,thu and jul,aug

The above formula indicates that scheduled days must be a Tuesday or must be a Thursday and must be in July or must be in August. In the first formula, the And operator is evaluated before the Or operators. In the second formula, the And operator is evaluated after the Or operators.

Auto-Date Formula Functions

Use the auto-date functions listed below to schedule specific days of a week, month, or year. You must use the exact spelling of the functions. For example, GroupWise reads "tue", but not "tues". GroupWise formula functions are not case-sensitive.

Day of the Week • For example, TUE would schedule all Tuesdays.

Day of the Month • For example, the number 3 would schedule the 3rd day of the month. Also, the word LAST would schedule the last day of the month.

Day of the Year • For example, 35 would schedule the thirty-fifth day of the

Month of the Year • For example, JAN would schedule all days in January.

Year • For example, 1998 would schedule all days in 1998.

Weekday of the Month • For example, TUE(1). This would schedule the first Tuesday of the month. Also, SUN(LAST) would schedule the last Sunday of the month, and FRI(LAST-1) would schedule the second to last Friday of the month.

Using Your Calendar

Using Your Daily Calendar

Use your Calendar to help you organize your time and your work. You can view your appointments, tasks, and reminder notes in a variety of formats, read them from your Calendar, save them, and print them out in various formats. You can use Proxy with your Calendar to manage the schedules of other users or resources.

Many types of calendar views and printouts are available to let you choose the one that most effectively displays the information you need. See *Printing Your Schedule* later in this section.

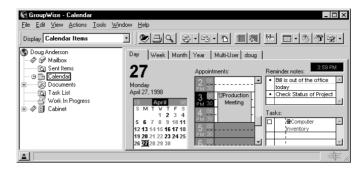
Viewing Your Calendar

GroupWise provides three organizational Calendar structures with variations for viewing appointments, tasks, and reminder notes. These convenient methods of viewing your scheduled items help you organize and focus on the information that is most important to you.

Calendar Folder

You can find all your GroupWise scheduled items in this location without opening a separate window. The Calendar displays views on tabs so you can easily switch from one calendar view to another. You can add more tabs to the Calendar and configure them however you want. The view that is displayed when you exit your Calendar will be displayed when you open the Calendar folder again.

1 Click in the Folder List.



Tips

- You can use Graphical Display to show appointment duration in blocks, in order to visualize time use in your schedule. Or you can use Textual Display to better comprehend the sequence of your appointments.
- Time intervals in the Appointments List can be adjusted from ten minutes to two hours, depending on how detailed you want your list to be.
- If you track your yearly progress by week numbers, you can display them on your Calendar.
- You can define your work schedule to display only your office hours on your Calendar.
- By using Show Appointment As, you can display levels of availability for appointments in Busy Search and in your Calendar.

Calendar View

You can view your schedule in a day, week, month, year, task list, project planner, multi-user, or specialized format. For example, the month view lets you view a month schedule, while the multi-user view lets you view, compare, and even manage the schedules of multiple users or resources to whose Calendars you have Proxy rights. See *Changing the Calendar View* later in this section. You can also specify a different default calendar view in Options. See *Setting Options for GroupWise* under *Customizing GroupWise*. In addition to the views provided, your system administrator can create custom calendar views for you with GroupWise View Designer, which is found in the GroupWise Software Developer's Kit.

 Click Window > Calendar to open a separate window displaying a calendar view.

or

Click on the toolbar.



As Calendar

This method of viewing your Calendar is useful if you store all your appointments or other items for a specific project or client in one folder and want to see your schedule for that project only.

- 1 Click a project folder in the Folder List.
- 2 Click View As Calendar to display all scheduled, accepted items that are saved in that folder.

Icons Appearing Next to Items in Your Calendar

The icons that appear in your calendar give you additional information about items.

Icon	Description
ŢŢ	An alarm is set for the item.
Ü	Group appointment, reminder note, or task.

■ The item is marked private.

Reading an Item in Your Calendar

1 Click in the Folder List.

or

Click Window > Calendar.

2 Double-click the item you want to read.

Tips

- In all views except the Year view, you can rest your mouse pointer on most items and see information such as Subject, Time, Place, and To. You can also double-click an item to read it.
- To close an item you have opened in your Calendar, click the close box.
- You can change the calendar view to a different format such as week, year, and so on. In the Calendar folder, click the corresponding tab or see *Changing the Calendar View* later in this section.

Saving an Item in Your Calendar

1 Click in the Folder List.

01

Click Window > Calendar.

- 2 Click the item you want to save ► click File ► Save As.
- **3** In the Save File As box, type a filename for the item.
- **4** To save the item in a different directory than is shown in the Current Directory box, click **Browse** ▶ click a drive ▶ click a folder ▶ **OK**.
- **5** If you want GroupWise to prompt you to replace an existing file with the same name, select the **Report Filename Conflicts** check box.
- 6 Click Save ► Close.

Tips

- When you save a Calendar item, GroupWise provides a filename using the subject line with a .MLM extension. You can use this name or type a different filename in the Save File As box.
- To save items, you can also right-click the item ➤ click Save As to open the Save dialog box.

Viewing the Schedules of Multiple Users

The Multi-User view lets you view the schedules of several people or resources side-by-side. This is useful for management and for keeping track of who is where. For example, you can use the Multi-User view to quickly find if any of your company's conference rooms is free for an impromptu meeting.

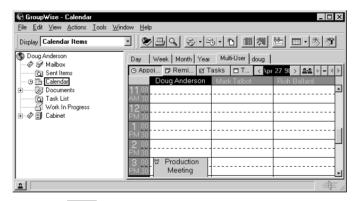
You must have the appropriate Proxy rights for each user or resource in order to include him or her in a multi-user view. For example, if you do not have Read rights for appointments, you will not be able to see another person's schedule in the Multi-User view.

A multi-user view is controlled by a Multi-User List. For example, if you create and use a list with users Alice, Becca, and Carl, you will see the schedule of these users in the columns of the Multi-User view. The left column will display the schedule of the first person in the list (Alice), the next column will display the schedule of the second user listed (Becca), and so on. You can create multiple multi-user views, each with its own Multi-User List, for various groups of users or resources that you manage. These Multi-User Lists can be edited, and user schedules within the list can be selected or deselected, depending on whose schedule you need to view.

- Click in the Folder List.
- Click the Multi-User tab.

or

If you have created multiple multi-user views, click the tab of the multi-user view you want to display, then skip to Step 4.



- Click ▶ select the check boxes by the names of the users whose schedules you want to view ▶ click OK.
- View the users' schedules. To view a different day, click **Go to Day** ▶ specify the date > click OK.

Tips

If you have appropriate Proxy rights, you can schedule an appointment by clicking and dragging from the appointment time across the users you want to include in the appointment.

Printing Calendar Items

Use Print to print one or more items from your Calendar and any attachments. You can also print an item that you are currently reading or creating. Set up your printer using the Windows Printers Control Panel.

Use Print Calendar to print appointments, tasks, and reminder notes in different formats and on various page sizes. For example, you could print a day calendar with all your appointments or a week calendar with all your appointments and tasks.

Print Calendar provides several categories of calendar print formats that vary according to what you want to accomplish. These categories are called calendar types. If you can't find a calendar print format that does what you want, try a different calendar type for a new group of formats. Descriptions of available calendar types are provided below.

Franklin Quest

These graphical calendar formats correspond with Franklin Day Planner® pages. These are ideal for people who want to coordinate their Franklin Day Planner and GroupWise Calendar or who follow the Franklin Covey organizational methodology. You can coordinate your Franklin Day Planner with your GroupWise Calendar two ways. You can print your schedule onto blank paper in various formats and sizes that can be trimmed to fit into your planner, or you can print your GroupWise schedule on the preprinted pages that come with your planner.

GroupWise

These graphical calendar formats allow for more complete text overflow than is possible in the Franklin Covey formats, and they show appointment duration graphically. For example, the Task List lets you print your Tasks List unconnected to any specific day and also allows printing of completed tasks.

Multi-User

This multi-column calendar format lets you print the schedules of several users side-by-side on one page. You must have Proxy rights for each user or resource you include in the schedule.

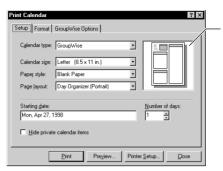
Text

This textual format provides all available information without truncation, can be printed to a file, and is good for lower-end printers.

Printing Your Schedule

1 Click and on the toolbar.

2 Click a calendar type in the Calendar Type drop-down list.



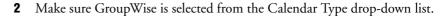
You can see what the printed text will look like in the View box.

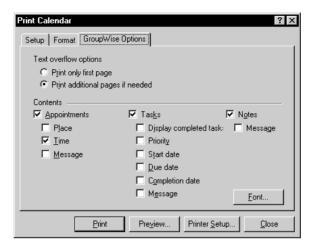
- **3** Click an option in the **Calendar Size** drop-down list. The options available depend on the calendar type selected.
- 4 Click an option in the Paper Style drop-down list. The options available depend on your printer.
- 5 Click a page layout type in the Page Layout drop-down list. You can see what the calendar looks like in the view box on the right. If you can't find a page layout that does what you want, select a different calendar type to see other page layouts.
- **6** Specify the first date you want to print in the **Starting Date** box.
- 7 Specify the number of days to print in the Number of Days/Weeks/Month box. (The name of this box varies, depending on the page layout selected.)
- 8 Click the Format tab ▶ type a header in the Header box if you want a title on the page ▶ select any Footer or Display options.
- **9** Click the *Calendar Type* options tab. ▶ specify the options you want. (The tab name and available options vary, depending on the calendar type selected.)
- **10** Click **Printer Setup** select a printer in the **Name** drop-down list.
- 11 If you are printing onto preprinted forms that will be fed manually into the printer rather than fed from a paper tray, click **Properties** ▶ Manual Feed in the Paper Source drop-down list.

Tips

- Click the **Preview** button to see how the schedule looks with the selected options.
- If you are acting as a proxy and printing out the schedules of several users, select **Name** on the **Format** tab to print each user's name on his or her respective schedule in the footer so you can tell the schedules apart at the printer.
- To include week numbers on the printout, select Week Numbers on the Format tab.
- If you frequently update and reprint your schedule, select Current Date and Time on the Format tab before printing so you can always tell which schedule printout is more recent.
- You can override the automatic settings for paper size. For example, you may want to print a Franklin Day Planner Pocket style in a landscape orientation on the printer paper, rather than in the normal portrait. Or, you may want to print on a specific paper type in a specific printer tray. Changing the paper size for the printer does not affect the calendar size selected in Calendar setup. To change the size of the paper used by the printer, click Printer Setup ▶ Properties ▶ click the Paper tab ▶ select a paper size.
- You can override the automatic settings for margin offset on the Franklin Quest Options tab. Slight variations in paper cutting may make margin adjustment necessary for some preprinted forms in order for the text to fit well within the lines. To adjust the margin offset vertically, specify the number of units to offset the text from the top margin in the From the Top box. To adjust the margin offset horizontally, specify the number of units to offset the text from the left margin in the From the Left box. The margin offset appears in the printed copy, not in the print preview.

Printing an Appointments, Tasks, or Reminder Notes List 1 Click an on the toolbar.





- Click an option in the Calendar Size drop-down list.
- Click a page layout type in the Page Layout drop-down list.
- If you are printing an appointment layout, specify the first date you want to print in the Starting Date box, then specify the number of days or weeks to print in the Number of Days/Weeks box. (The name of this box varies, depending on the page layout selected.)
- Click the Format tab by type a header in the Header box if you want a title on the page ▶ select any Footer or Display options.
- 7 Click the **GroupWise Options** tab ▶ select the options you want.
- Click **Printer Setup** select a printer in the **Name** drop-down list.

9 Click Print.

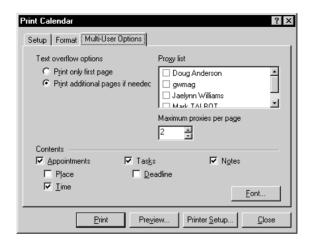
Tips

- If your job is task-focused, use a Task List page layout to print a list of your current or current and completed tasks unconnected to any day. Tasks are sorted by due date.
- If you manage more than a few reminder notes, use a Note List page layout to consolidate them into a notes-focused printout.
- You can also print your appointments, tasks, and reminder notes together in an integrated schedule. Integrated schedule page layouts include the Day Organizer, Day Tri-Fold, and many of the Franklin Quest calendar type page layouts.
- Click the Preview button to see how the page layout looks with the selected options.
- To include week numbers in an appointment or reminder note printout, select Week Numbers on the Format tab.
- If you frequently update and reprint your Appointments, Tasks, or Reminder Notes List, select Current Date and Time on the Format tab before printing so you can always tell which schedule printout is more recent.

Printing the Schedules of Multiple Users

- 1 Make sure you have proxy Read rights to the Mailboxes of all the users whose schedules you want to print.
- 2 Click to make sure that all of the users whose schedules you want to print appear in your Proxy List. If they do not appear on the list, add them.
- 3 Click a on the toolbar.
- 4 Click Multi-User in the Calendar Type drop-down list.
- **5** Click an option in the Calendar Size drop-down list.
- 6 Click a page layout type in the Page Layout drop-down list. If you are going to include more than two or three users, you will probably want to select Daily Calendar (Landscape) for legibility.
- 7 Specify the first date you want to print in the Starting Date box.
- 8 Specify the number of days to print in the Number of Days box.

Click the Multi-User Options tab ▶ select a text overflow option ▶ select the contents items to include.



- **10** Specify the Maximum Proxies Per Page. For example, if you are going to print the schedules of nine users, but you only want three schedules per page, specify 3.
- 11 In the Proxy List box, select the users whose schedules you want to print.
- **12** Click Printer Setup select a printer in the Name drop-down list.
- 13 Click OK ▶ Print.

Tips

- Click the Preview button to see how the schedule looks with the selected options.
- For help on a dialog box option, click ! the option.

Changing the Calendar View

Click the arrow on the right of on the toolbar ▶ click a view.

Tips

- Change the calendar view to see a year calendar, a weekly schedule, a project planner view, and so on.
- You can specify a different default Calendar view in Options. See Setting Options for GroupWise under Customizing GroupWise.

Changing the First Day of the Week in Your Calendar

- 1 Click Tools ▶ Options.
- 2 Double-click Date & Time > click the Calendar tab.
- 3 Select a day in the Month Display Options group box ▶ click OK.

Viewing a Different Date in Calendar

Click in the Folder List. 1

Click Window > Calendar.

If the view tab displayed has a Calendar toolbar, click the date in the Calendar toolbar.

If the view displayed has no toolbar, click View > Go to Date > specify a date ► click OK.

3 If you want to return to today's date, click View ▶ Go to Today.

or

Click Today in the Calendar toolbar.

Tips

- Use Go To Date to view the schedule of a day not visible on your
- Going to a different date is not applicable to some views. For example, a view that displays a Tasks List only is not connected to one specific date.
- For help on a dialog box option, click ! the option.

Setting Alarms for Calendar Items

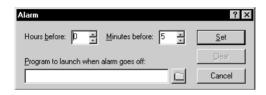
GroupWise can sound an alarm to remind you of an upcoming appointment. You can also choose to open a file or to run a program when the alarm goes off. For example, you can set an appointment to back up your files when you aren't at work and your computer is on.

In Options, you can specify a default that automatically sets an alarm each time you accept an appointment.

IMPORTANT: Notify must be open or minimized for the alarm to sound.

Setting an Alarm

- In your Mailbox or Calendar, click an appointment.
- 2 Click Actions ► Alarm.



Specify the number of hours or minutes before the appointment that you want the alarm to sound ▶ click Set.

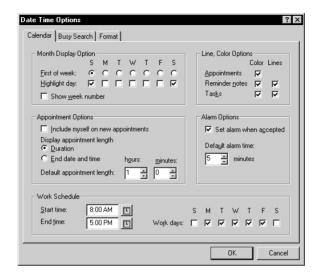
Tips

- You can also right-click the appointment, then click **Alarm** to set an
- If Alarm is dimmed, make sure that the appointment time hasn't already passed.
- To remove an alarm that has been set for appointment, click the appointment ► Actions ► Alarm ► Clear.
- In Options, you can choose to automatically set an alarm each time you accept an appointment. See Setting Options for GroupWise under Customizing GroupWise.
- You can specify a path to an application so that the application launches when the alarm goes off.

Specifying How Long Before an Event the Alarm Sounds

Click Tools ▶ Options.

2 Double-click Date & Time ▶ click the Calendar tab ▶ make sure Set Alarm When Accepted is selected.



- 3 Specify the hours and minutes before an event that you want an alarm to sound.
- 4 Click OK.

Tips

Managing Your Mailbox

Using the Folder List

Use folders to store and organize incoming and outgoing items such as appointments, reminder notes, tasks, document references, and mail or phone messages in your Mailbox. Folders let you group all items related to a particular task together. A typical user's Folder List might look like this:



All folders in your Main Window are subfolders of your user folder. Your user folder represents your user database, and contains all of your GroupWise® information. Under the user folder there is the Mailbox, a Sent Items folder, the Calendar, a Task List folder, the Documents folder, the Work In Progress folder, the Cabinet (which contains all your personal folders), and the Trash. You can organize items in your folders by moving or linking them. When you move an item into a folder, it is taken from one location and placed in another. When you link an item to a folder, the item still exists in its original folder and it also appears in the new folder. When you change a linked item, it is also changed in the other folders.

You can define a different set of properties for each folder in your Folder List. These properties include which columns appear in the Item List, the order and size of the columns, the sort order, and whether items are displayed by details or discussion thread.

You can create as many display settings as you want, and apply them to any folders in your Folder List. For example, you could use one display setting for most of your folders, and have special display settings for a few personal folders.

You can store unfinished items in a pre-defined folder called Work In Progress. See *Saving Items in Your Mailbox* under *Managing Your Mailbox*. You can store all of your documents in the Documents. See *Organizing Your Documents* under *Creating and Working With Documents*. You can also make folders public by sharing them. See *Using Shared Folders* under *Managing Your Mailbox*.

Renaming Folders

 In the Main Window, right-click the folder you want to rename ➤ click Rename. Type a new name for the folder.

Tips

You cannot rename the Calendar, Cabinet, Documents, Mailbox, Work In Progress, or Trash folders.

Deleting Folders

- Right-click the folder you want to delete ▶ click Delete.
- Click Items Only or Folder(s) and Items ▶ OK.

Tips

- You cannot delete the Calendar, Cabinet, Documents, Mailbox, Work In Progress, or Trash folders.
- To delete a folder that is shared with you, right-click the folder click Delete ► Yes.

Creating a Personal Folder

- In the Folder List, click File ▶ New ▶ Folder.
- Make sure Personal Folder is selected ▶ click Next. 2
- 3 Type the name and description for the new folder.
- Click Up, Down, Right, or Left to position the folder where you want it in the Folder List ▶ click Next.
- Specify the display settings for the folder ▶ click Finish.

Tips

If you create a folder, then decide you want it in a different position, drag the folder to a new position in the Folder List.

Creating a Shared Folder

- 1 In the Folder List, click File ➤ New ➤ Folder.
- 2 Click Shared Folder ▶ Next.
- Type a name and description for the new folder. 3
- Click Up, Down, Right, or Left to position the folder where you want it in the Folder List > click Next.
- Specify the display settings for the folder ▶ click Next.
- In the Name box, start typing the name of the user.

- 7 When the user's name appears in the box, click Add User to move the user into the Share List.
- **8** Click the user's name in the Share List.
- **9** Select the access options you want for the user.
- **10** Repeat steps 6-9 for each user you want to share the folder with.
- 11 When you're done, click Finish.

Moving an Item to Another Folder

1 Drag an item from the Item List to the folder you want.

Tips

- To remove all links from an item when you move it, press **Alt** while you drag an item onto a folder. The item is removed from all folders it was previously linked to and is placed in only one folder.
- To link an item to another folder and leave a copy in the original folder, press Ctrl while you drag an item to another folder.

Putting Items in More Than One Folder

- 1 Click an item in the Mailbox.
- 2 Click Edit ➤ Move/Link to Folders.
- **3** Select the check box next to each folder you want the item in.
- 4 Click Link.

Tips

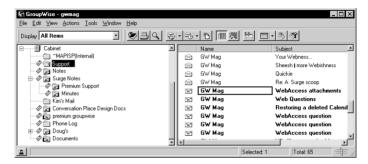
- If you delete the original item, the copies in your other folders remain.
- Click **Delete Old Links** to delete an item from all folders it was previously linked to and to move the item to a new folder.
- În the Main Window, press Alt while you drag an item onto a folder to move the item into the folder. The item is removed from all folders it was previously linked to and is placed in only one folder.
- In the Main Window, press Ctrl while you drag an item onto a folder to link the item to that folder.

Restoring Your Sent Items Folder

- 1 In the Folder List, click File ► New ► Folder.
- 2 Click Find Results Folder ➤ Predefined Find Results Folder ➤ click Sent Items ➤ Next.
- **3** Click **Up**, **Down**, **Right**, or **Left** to position the folder where you want it in the Folder List.
- 4 Click Finish.

Using Shared Folders

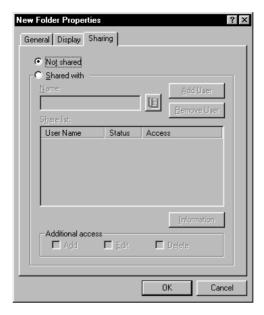
You can make personal folders in your Cabinet public by sharing them. For example, if you want to have a place where everyone in your department can put and view GroupWise items like mail messages, documents, and so forth, you can share a folder. You choose whom to share the folder with, and what rights to grant each user. Then, users can post messages to the shared folder, drag existing items into the folder, and create discussion threads. This is what the contents of a typical shared folder might look like:



If you use GroupWise Remote, changes in shared folders are updated whenever you connect to the master GroupWise system. For example, if you add an item to a shared folder from your Remote Mailbox, people in your office will see that item in the shared folder only after you dial into the master GroupWise system.

Sharing an Existing Folder with Other GroupWise Users

1 In the Main Window, right-click the folder you want to share ▶ click Sharing.



- 2 Click Shared With.
- **3** In the Name box, start typing the name of a user.
- 4 When the user's name appears in the box, click Add User to move the user into the Share List.
- **5** Click the user's name in the Share List.
- **6** Select the access options you want for the user.
- **7** Repeat Steps 3-6 for each user you want to share the folder with.
- 8 Click OK.

Tips

• If you want the folder to have a specific function, you might create a new display setting. For example, if the folder is for shared discussions, you should create a setting that views items by reply thread and contains both sent and received items. Right-click the folder • click **Properties • Display**.

Posting a Message to a Shared Folder

- Click the shared folder in your Folder List to open it.
- 2 Click File ▶ New ▶ Discussion.
- 3 Type a subject.
- Type your message.
- Click Post.

Tips

- To reply to an existing item in a shared folder, open the item ▶ click **Reply** ▶ select a reply option ▶ click **OK**.
- You can attach files to shared topics so that others can access those files easily. See Attaching Files under Working with Items in Your Mailbox.

Running Notify

Notify alerts you when you have new items placed in your Mailbox, when your outgoing items are opened, or when you have an upcoming appointment. Notify can alert you in four ways: a sound, a dialog box, a small icon, or by launching an application. Each method is described in the following table:

Notify Method	Description
Notify Icon on the Windows Taskbar	An envelope appears over the globe when you receive a new item or alarm. If the Notify icon doesn't appear on the taskbar, Notify is not running.
Notify Sound	Notify plays a system beep or sound file when you receive an item. When you receive an alarm, the sound plays once every five minutes until you clear the alarm from the Notification List.
Notification List	The Notification List is a dialog box that lists all of the new, unopened items and alarms you have received. You can leave it open on your desktop, or open it from the Notify icon when you want to see it.
Notify Dialog Box	The Notify dialog box opens in front of whatever application you are using when you receive a new item or alarm.

You can receive alarms and notifications for another user if that user gives you those rights in the Access List. See Giving Other People Access to Your Mailbox under Managing Your Mailbox.

Notify is installed in the same folder as GroupWise when you run GroupWise Setup. Notify runs minimized in the background while you run other programs.

When Notify is running, the globe icon appears on your Windows® taskbar.



Starting Notify

Click Start on the Windows taskbar ▶ Programs ▶ GroupWise 5 ▶ GroupWise Notify.

Tips

To make access easier, create a shortcut to Notify on your Windows desktop.

Reading an Item from Notify

When the Notify dialog box appears, click Read.

If a Notify dialog box does not appear when you receive notification, right-click on the Windows taskbar ► click Read Mail.

Displaying the Notify Dialog Box When You **Receive Notification**

- Right-click on the Windows taskbar. (Notify must be running.)
- Click **Options** ▶ click the **Notify** tab.
- Make sure **Show Dialog** is selected for the item types and priorities you want.

Turning off Notification

- Make sure Notify is running. 1
 - Right-click ♥ on the Windows taskbar ► click Exit.

Setting How Often Notify Checks for New Items

- Make sure Notify is running. 1
- Right-click ♥ on the Windows taskbar ► click Options. 2
- Type the number of minutes under Check for Mail Every. 3

Setting How to be Notified When Outgoing Messages Change Status

- Make sure Notify is running. 1
- Right-click ♥ on the Windows taskbar ► click Options. 2
- Click the Return Status tab.

- Deselect Use Same Settings for All Types.
- Click the Settings For drop-down list > click the item type you want to make selections for.
- Click how you want to be notified for different status changes of that item type.

Tips

Leave Use Same Settings for All Types selected if you want to be notified the same way for all item types.

Setting How to be Notified of Items in Your Mailhox

- Make sure Notify is running.
- Right-click **S** on the Windows taskbar ▶ click **Options**. 2
- 3 Click the Notify tab.
- Deselect Use Same Settings for All Types.
- Click the Settings For drop-down list, then click the item type you want to make selections for.
- Click how you want to be notified for different priority levels of that item type.

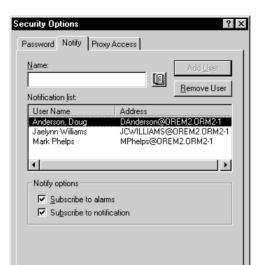
Tips

Leave Use Same Settings for All Types selected if you want to be notified the same way for all item types.

Getting Notified of Someone Else's Messages

When you start GroupWise, you are already subscribed to Notify. To subscribe to someone else's notification,

- In the Main Window, click Tools ▶ Options.
- Double-click **Security** ▶ click the **Notify** tab.
- 3 Type the name of a user for whom you proxy.
- 4 Click Add User.
- Click the user's name in the Notification List.



6 Make sure Subscribe to Notification and Subscribe to Alarms are selected.

7 Click OK.

Tips

 Notify must be running for you to receive notification of alarms, incoming items, or change in return status of outgoing items.

Cancel

- You can receive notification for someone else only if he or she has given you proxy rights plus appropriate rights in his or her Access List. See Giving Other People Access to Your Mailbox under Managing Your Mailbox.
- You cannot receive notification for someone who is on a different post office than you.

Archiving the Items in Your Mailbox

Use Archive to save mail or phone messages, appointments, reminder notes, or tasks to a designated database on a local drive. Archiving items saves network space and keeps your Mailbox uncluttered. For example, if you have important items in your Mailbox that are not currently relevant to your work, you can

archive them. You can view archived items whenever you need to. You can also unarchive any archived item. When you archive an item you have sent, you will not be able to track the status of that item. Archive is not available in Remote.

Archive and Folders

When you move an item to a folder, it is not archived. Items in folders are still affected by the Clean Up options you specify in Environment Options.

Archiving an Item in Your Mailbox

- If you have not previously done so, specify the archive path in File Location in the Environment dialog box. See Setting Options for GroupWise under Customizing GroupWise.
- Select the items in your Mailbox you want to archive.
- Click Actions ► Archive.

Tips

When you archive an item you have sent, you cannot track the status of that item.

Viewing Archived Items

In the Main Window, click File > Open Archive.

Unarchiving Items

- 1 Click File • Open Archive.
- 2 Click the item you want to unarchive ▶ Actions ▶ Archive.
- Click File > Open Archive to return to the Main Window.

Tips

Unarchived messages are returned to the folder from which they were archived. If the folder has been deleted, GroupWise creates a new folder.

Archiving Items Automatically

Click Tools ▶ Options.





- **3** Select Auto-Archive After for the item type you want.
- 4 Specify the number of days after the item is delivered or completed that you want it to be archived.
- 5 Click OK.

Printing Items in Your Mailbox

Use Print to print one or more items from your Mailbox or Calendar and any attachments. You can also print an item that you are currently reading or creating. Set up your printer using the Windows Printers Control Panel.

You can print an attached file from the application in which it was created, if you have access to that application. Or, you can print an attached file from GroupWise. Printing from GroupWise may save time since another application doesn't have to be opened; however, the attached file may print with slightly different formatting.

Use Print Calendar to print your schedule including appointments, tasks, and reminder notes in different formats and on various page sizes. For example, you could print a day calendar with all your appointments or a week calendar with all your appointments and tasks. See *Using Your Daily Calendar* under *Using Your Calendar*.

Printing GroupWise Items

- 1 In the Item List in your Mailbox, click or open the item you want to print. Ctrl+click to select multiple items.
- 2 Click File ▶ Print.
- **3** Click the items you want to print.

4 Click Print.

Tips

• You can print attachments from GroupWise. You can also print attachments from the associated application.

Printing an Attached File from GroupWise

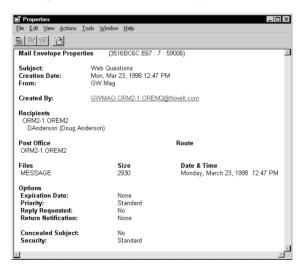
- 1 Open or click the item containing the attached file.
- 2 Click File ▶ Print.
- 3 Click the attached file you want to print.
 Ctrl+click other files to print more than one attachment.
- 4 Click Print.

Printing an Attached File from Another Application

- **1** Open or click the item containing the attached file.
- 2 Click File ▶ Print.
- Click the attached file you want to print.Ctrl+click other files to print more than one attachment.
- 4 Click Print Attachment with Associated Application ➤ Print.

Printing Status Information About an Item

1 Right-click an item ► click Properties.



2 Right-click in the Properties window ► click Print.

The information is sent immediately to the printer.

Creating Rules

Use Rules to define a set of conditions and actions to be performed when an item meets those conditions. You can specify such actions as moving items to folders, forwarding and replying to items, and more. Rules can help you organize your Mailbox, automate your Mailbox when you are away, or delete unwanted items.

When you create a rule, you must do the following:

- Name the rule.
- Select an event. The event is the trigger that starts the rule.
- Select the types of items that will be affected by the rule.
- Add an action. The action is what you want the rule to do when it is triggered.
- Save the rule.

You can specify many more options to limit which items a rule affects. For example, you can apply a rule to only accepted appointments, to items with a certain word in the Subject box, or to items with a high priority.

Assigning Rule Actions

Each rule must have an action assigned. The action is what the rule does when the rule criteria is met. For example, if you've been reassigned to a new project, you can create a rule that forwards each new item dealing with the old project to your replacement. The following list explains each rule action.

Action	Result
Send Mail	Sends a prepared mail message to the recipients you specify when the rule conditions are met. For example, assume you need to inform your boss each time you receive a monthly report from another group of people. Your boss may not want to see the report; he or she simply needs to know that you've received it.
Forward	Forwards items to one or more users when the rule conditions are met. For example, assume a co-worker has agreed to handle your mail while you're away. You decide what type of incoming items you want your co-worker to handle and create a rule to forward those items.
Delegate	Delegates an appointment, reminder note, or task to another user when the rule conditions are met. For example, assume someone agrees to cover for you while you're away from the office. Your rule can delegate appointments, tasks, or reminder notes to that person. The original sender can find out whom you have delegated the item to in the Properties window.

Action	Result
Reply	Sends a prepared reply to the sender when the rule conditions are met. For example, if you have to be out of the office for several days, your rule could send a reply to the senders of incoming items indicating where you are, when you'll be back, and whom to contact for urgent business.
	When you send automatic replies, you should typically reply only to high-priority items and items in which the sender has requested a reply. This way, your replies aren't sent to mail list groups and company-wide mail.
Accept	Accepts an appointment, reminder note, or task when the rule conditions are met. For example, your rule could accept all appointments from a specific individual.
Delete/Decline	Deletes or declines any item when the rule conditions are met. For example, your rule could decline any appointment scheduled for a certain day of the week if you are always unavailable for meetings on that day.
Empty Item	Deletes the items from the Trash when the rule conditions are met. The items are not recoverable after they are emptied from the Trash.
Move to Folder	Moves items to a folder when the rule conditions are met. For example, you may want all items with certain words in the Subject box moved to a common folder.
Link to Folder	Links items to one or more folders when the rule conditions are met. Linking an item to a folder lets you view the item from more than one folder. For example, if you have an item that relates to Marketing and Personnel, you can place it in the Marketing folder, then link it to the Personnel folder. You can then open the item from either folder.
Mark as Private	Marks all items matching the rule conditions as private. When an item is marked private, you can restrict your proxies from accessing the item.
Mark as Read	Marks all items matching the rule conditions as if they have been read. For example, assume you are skimming a reply thread in a shared folder. If you didn't want to follow the thread anymore, your rule could mark all the items in the thread as if they had been read so they wouldn't sort at the top of the Item List.
Archive	Archives items when the rule conditions are met. For example, your rule could archive all items regarding a certain subject.

Action	Result
Mark as Unread	Marks all items matching the rule conditions as if they have not been read. Usually, you will click Actions • Read Later to mark an item unread. A rule action is also available in case you want to automate this process or apply the unread status to several items at once.
Stop Rule Processing	Stops other rules from acting on items that meet the rule conditions. Remember that rules are executed in the order they are listed in the Rules dialog box. If there are other rules that would normally affect these items, this rule action will prevent the other rules from executing.

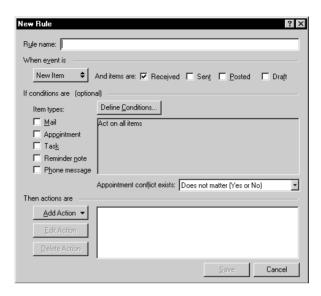
Selecting Events that Trigger a Rule

An event is the trigger that activates the rule. The different types of events are explained below.

Event	Result
New Item	The rule is triggered when a new item is placed in your GroupWise Mailbox. Clicking Received lets only incoming items trigger the rule. Clicking Sent lets only items you send trigger the rule. Clicking Posted triggers the rule each time you create a posted appointment, reminder note, or task. Clicking Draft lets only items marked as unfinished, or draft, trigger the rule.
Filed Item	The rule is triggered when an item is placed in a specific folder. If you do not specify a folder, the rule is triggered when an item is moved to any folder.
Open Folder	The rule is triggered when you open a specific folder. If you do not specify a folder, the rule is triggered when you open any folder.
Close Folder	The rule is triggered when you close a specific folder. If you do not specify a folder, the rule is triggered when you close any folder.
Startup	The rule is triggered when you start GroupWise.
Exit	The rule is triggered when you exit GroupWise.
User Activated	The rule can only be triggered manually by selecting the rule in the Rules dialog box, then clicking Run .

Creating a Rule

1 Click Tools ➤ Rules ➤ New.



- **2** Type a name in the **Rule Name** box.
- **3** Click the **When Event Is** pop-up list ▶ click an event to trigger the rule.
- **4** If you clicked **New Item**, **Startup**, **Exit**, or **User Activated**, click one or more sources for the item. For example, click **Received** and **Posted**.

or

If you clicked **Filed Item**, **Open Folder**, or **Close Folder**, click the folder icon ▶ a folder ▶ **OK** to display the folder name.

- 5 Click one or more types of items you want the rule to act on in the Item Types list.
- 6 If you want to further restrict the items affected by the rule, click **Define** Conditions ▶ click the appropriate options ▶ OK.
- 7 Click Add Action ➤ click the action you want the rule to perform. Some actions such as Send Mail and Reply require you to fill in additional information.
- 8 Click Save.

Tips

 If Save is dimmed, you may have forgotten to type a rule name or add an action.

Copying a Rule to Make a New Rule

- 1 Click Tools ► Rules.
- **2** Click the rule you want to copy ► Copy.
- **3** Type the name of the new rule.
- **4** Make the appropriate changes to the rule.
- 5 Click Save.

Editing a Rule

- 1 Click Tools ➤ Rules.
- 2 Click the rule you want to edit ► Edit.
- **3** Make the appropriate changes to the rule.
- 4 Click Save.

Deleting a Rule

- 1 Click Tools ➤ Rules.
- **2** Click the rule you want to delete ▶ **Delete**.
- 3 Click Yes.

Limiting Items Affected by a Rule

Use Define Conditions to further limit the items affected by a rule. For example, you can specify that you want the rule to affect appointments that have been accepted, or mail messages with certain words in the Subject line, and numerous other possibilities.

- 1 In the New or Edit Rules dialog box, click **Define Conditions**.
- **2** Click the first drop-down list ▶ click a field.
- **3** Click the operator drop-down list ▶ click an operator.
- **4** Type the criteria for the filter.

or

If provided, click the drop-down list ▶ click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive.

5 Click the last drop-down list ▶ click **End**.

or

Click And or Or to further limit the items affected by the rule.

Running a Rule Manually

If you've created a rule that you don't want to act on items continually, you can run it manually as needed. For example, instead of a rule always moving certain items into a folder, you may want the items to accumulate in your Mailbox until you're ready for them to be moved all at once.

- 1 Click the items or folders that you want affected by the rule.
- 2 Click Tools ► Rules.

- Click the rule you want to run manually.
- Click Run > Close.

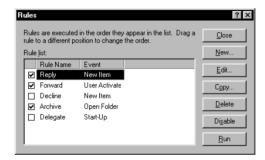
Tips

The rule actions occur after you close the Rules dialog box.

Enabling or Disabling a Rule

A rule must be enabled before it can be triggered. When a rule is enabled it is marked with a check. When you disable a rule, the rule cannot be triggered. However, the rule is still listed in the Rules dialog box so you can enable the rule when you need it again.

Click Tools ➤ Rules.



- Click the rule you want to enable or disable.
- Click Enable or Disable.

This button toggles between Enable and Disable.

Tips

- An enabled rule has a check mark in the box.
- You can also click in the box next to the rule name to enable or disable it.

Giving Other People Access to Your Mailbox

Proxy lets you manage another user's Mailbox and Calendar. Proxy lets you perform various actions, such as reading, accepting, and declining items on behalf of another user, within the restrictions the other user sets.

Receiving Proxy Rights

Two steps must be completed before you can act as someone's proxy. First, the person for whom you plan to act as proxy must grant you rights in the Access List in Options. Second, you must add that user's name to your Proxy List so you can access his or her Mailbox or Calendar easily.

Once you have completed the two steps above, in your Proxy pop-up list click the name of the person you're proxying for whenever you need to manage his or her Mailbox or Calendar. You can also manage the schedules of users and resources for whom you have proxy rights with the Multi-User Calendar view.

Granting Proxy Rights

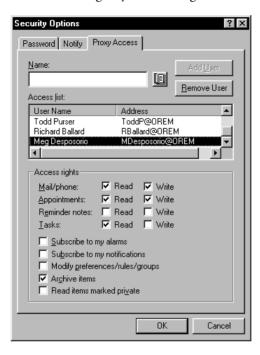
Use the Access List in Security Options to give other users rights to proxy for you. You can assign each user different rights to your calendaring and messaging information. If you want to let users view specific information about your appointments when they do a Busy Search on your Calendar, give them Read access for appointments. The following table describes the rights you can grant to users:

This right	Lets your proxy do this
Read	Read items you receive.
Write	Create and send items in your name.
Subscribe to my alarms	Receive the same alarms you receive.
Subscribe to my notifications	Receive notification when you receive items.
Modify options/rules/folders	Change the options in your Mailbox. The proxy can edit any of your Options settings, including the access given to other users.
Archive items	Store and read your items in his or her archive folder. If you give a proxy Archive rights, items archived by that proxy may be stored on his or her hard disk and will be inaccessible to you.
Read items marked Private	Read the items you marked Private. If you don't give a proxy Private rights, all items marked Private in your Mailbox are hidden from that proxy.

Editing Your Access List

- 1 Click Tools ➤ Options.
- 2 Double-click Security ► click the Proxy Access tab.
- **3** To add a user to the list, type the name in the Name box ▶ when the full name appears, click **Add User**.

- 4 Click a user in the Access List.
- **5** Select the rights you want to give to the user.



- **6** Repeat Steps 4-5 to assign rights to each user in the Access List.
- 7 Click OK.

Tips

- To delete a user from the Access List, click the user ▶ Remove User.
- You can select Minimum User Access in the Access List to assign a
 default set of rights to all users in the Address Book. For example, if
 you want all users to have rights to read your mail, you would assign
 Read rights to Minimum User Access.

Managing Someone Else's Mailbox or Calendar

- 1 In the Main Window or Calendar, click 🚨 to open the Proxy pop-up list.
- 2 Click the name of the person whose Mailbox you want to access.

When you have finished your work in the other person's Mailbox, click click your own name to return to your Mailbox.



Tips

Before you can act as a proxy for someone, that person must give you proxy rights in his or her Access List in Options. Before you can click that person's name in your Proxy pop-up list, you must add it to your Proxy List.

Adding a User to Your **Proxy Pop-up List**

- In the Main Window or Calendar, click Proxv.
- Specify the user whose Mailbox you want to access ▶ click OK. The user's Mailbox opens. The name of the person you are a proxy for is displayed at the top of the Folder List.
- To return to your own Mailbox, click your name.

Tips

- Once you add a user's name to your Proxy pop-up list, you can click it whenever you want to access the Mailbox. To return to your own Mailbox, click your own name in the Proxy pop-up list.
- You need Proxy rights in the Access List in Options before you can act as a proxy for another user.
- If you have Proxy rights, you can view the schedules of multiple users or resources side-by-side.
- If you are a proxy for more than one person and all the people you are proxy for give you Read and Write rights to their Calendars, you can view and print their schedules side-by-side. See *Using Your Daily* Calendar under Using Your Calendar.
- As a proxy you can use Mark as Unread on the Actions menu to change the icon next to messages you have opened so that the user the messages belong to can keep track of the messages he or she has
- You may have limited access to the other user's Mailbox, depending on the rights the user assigned you in the Access List in Options.
- You can act as a proxy for any user on your post office who gives you rights. If you want to act as a proxy for a user on another post office, client/server must be enabled on the destination post office.
- You can work with several Mailboxes open at one time. You can tell the Mailboxes apart by checking the Mailbox owner's name, which appears as the user label for each Mailbox.

Deleting a User from Your Proxy Pop-up List

- 1 In the Main Window or Calendar, click ▲ Proxy.
- **2** Click the name you want to remove ▶ click **Remove**.
- 3 Click OK.

Tips

- Remove a user from your Proxy pop-up list if you are no longer acting as a proxy for that user.
- Removing a user from your Proxy pop-up list does not remove your rights to act as a proxy for that user. The user whose Mailbox you access must change your rights in the Access List in Options.

Marking an Item Private

You can limit a proxy's access to individual items in your Mailbox or Calendar by marking items Private.

When you mark an item Private, you prevent unauthorized proxies from opening it. Unauthorized proxies are proxies to whom you have not given rights to open items marked Private. Proxies cannot access items marked Private unless you give them those rights in your Access List.

If you mark an item Private when you send it, neither your proxies nor the recipient's proxies can open the item without rights. If you mark an item Private when you receive it, it cannot be read by your unauthorized proxies, but it can be read by the sender's proxies.

1 To mark an item in your Item List Private, click the item ▶ click Actions ► Mark Private.

or

To mark an item in your Calendar Private, click an item in the Appointments, Reminder Notes, or Tasks list ► click Actions ► Mark Private.

Saving Items in Your Mailbox

You can save items and attachments as files on your hard disk, in a personal network folder, or on a diskette. You can also save items and attachments as documents in GroupWise Library.

When you save an item in your Mailbox, GroupWise leaves the item in your Mailbox and saves a copy of the item in the location you specify. Items saved to disk and to GroupWise Library are saved as WordPerfect® 5.1 documents. Attachments retain their original format.

Once an item is saved, you can retrieve the item into another application, such as WordPerfect.

Saving an Item in Your Mailbox

- 1 Click the item you want to save ► click File ► Save As.
- **2** Type a filename for the item in the Save File As text box.

When you save an item, GroupWise uses the subject line as the filename with a .MLM extension. You can use this name or type a different one in the **Filename** text box.

- **3** If you want to save the item in a different directory than is shown in the Current Directory text box, click **Browse**.
- 4 If you want GroupWise to prompt you to replace an existing file with the same name, select Report Filename Conflicts.
- 5 Click Save ► Close.

Tips

- You can save attachments by selecting the attachments in the Items to Save list box.
- You can also right-click an item > click Save As to open the Save dialog box.

Saving an Attachment

- 1 Click the item containing the attachment you want to save.
- 2 Click File ► Save As ► click the attachment.

You can Shift+click or Ctrl+click multiple attachments to save them.



In the Save File As box, type a filename for the attachment.

- To save the item in a different directory than is shown in the Current Directory box, click **Browse** ► click a drive ► click a folder ► **OK**.
- If you want GroupWise to prompt you to replace an existing file with the same name, select the Report Filename Conflicts check box.
- Click Save ▶ Close.

Report file name conflicts

Saving an Item or Attachment as a **Document**

- 1 Click the item or attachment you want to save ▶ click File ▶ Save As.
- 2 In the first drop-down list, click Save to GroupWise Library.
- 3 Type a subject for the document.
- Click a library to save the document in.

Tips

- If you want new documents to use the default values you selected for all the required fields in the document property sheet, select the **Set** Properties Using Default Values check box. However, if you haven't selected default values for all the required fields, the property sheet will appear when you click Save, regardless of whether the box is selected.
- Items are saved to the document library in WordPerfect 5.1 format. Message headers, including the To and Subject fields, are included in saved documents.
- Attachments are saved to the document library in their original format.

Saving Status Information

- 1 Click an item ▶ File ▶ Properties to display the status information.
- 2 Click File ▶ Save As.
- 3 Type a filename.
- If you want the file to have an extension, type one in; GroupWise does not add one for you.
- Click Save.

Tips

The text is saved in WordPerfect 5.1 format.

Saving an Unfinished Item

- From the item view, click File ▶ Save Draft. 1
- Click the folder you want to save the item to ▶ click **OK**.

Tips

- The draft message is placed in the folder you chose in Step 2. The default folder for unfinished messages is the Work In Progress
- You can also save an item by clicking Cancel in the item view. Click Yes when you are asked if you want to save the message. It is then placed in the folder you specify.

Owning Resources

Resources are items that can be scheduled for meetings or other uses. Resources can include rooms, overhead projectors, cars, and more. The system administrator defines a resource by giving it an identifying name and assigning it to a user on the same post office. A user assigned to a resource is the owner of that resource and has full Proxy rights to receive notification of appointments and accept or decline appointments.

Resources can be included in a Busy Search, just as users can. Resource IDs are entered in the To box.

Accepting and Declining Resource Requests

- In the Main Window or Calendar, click
- Click the resource you own.

- If the resource you own isn't listed in the Proxy pop-up list, click Proxy type the name of the resource you own in the Name box ▶ click OK.
- Double-click the item you need to accept or decline.
- Click Actions Accept or Decline OK.

Tips

- You can accept or decline resource requests only if you are the owner and have been granted Read and Write rights.
- If you want to be the owner of a resource on a different post office, client/server must be enabled on the resource's post office.

Receiving Notification When a User Requests a Resource

- In the Main Window, click Tools ▶ Options ▶ double-click Security ▶ click the **Notify** tab.
- In the Notification list box, click the resource.
- Make sure Subscribe to Notification is selected ▶ click OK.

Tips

• If you do not see the resource listed in Step 2 above, type the resource name • click Add User.

Creating a Rule for a Resource

As the owner of a resource, you have full Proxy rights to that resource, including the ability to create rules for it. The following steps show you how to create a rule that accepts all requests for an available resource. This is an example of one rule that is useful for a resource. You can create numerous other rules that perform different actions. For example, you might create a rule that declines requests for a resource that is already scheduled. See *Creating Rules* under Managing Your Mailbox.

- 1 In the bottom left corner of the Main Window or the top left corner of the Calendar, click
- **2** Click the resource you own.

If the resource you own isn't listed in the Proxy pop-up list, click Proxy > type the name of the resource you own in the Name box ▶ click OK.

- Click Tools ► Rules ► New.
- Type a name for the rule.
- Click **Appointment**. Make sure the other item types are deselected.
- Click the **Appointment Conflict Exists** drop-down list ▶ click **No**.

- Click Add Action ► Accept ► type a comment if desired ► click OK. Steps 6 and 7 instruct the rule to accept the appointment for the resource only if the resource is available.
- Click Save ► Close.

Opening and Emptying the Trash

All deleted mail and phone messages, appointments, tasks, document references, and reminder notes are stored in the Trash. Deleted items can be viewed, opened, or returned to your Mailbox until the Trash is emptied (emptying the Trash removes items in the Trash from the system). You can empty your entire Trash, or empty only selected items. Items in the Trash are emptied according to the days entered in the Cleanup tab in Environment Options, or you can empty the Trash manually.

Opening Your Trash

In your Folder List, click 🕦



You can open, save, and view information on items in the Trash. You can also remove items from the system or return them to the Mailbox. Right-click an item in the Trash to see a QuickMenu[™] of these options.

Undeleting an Item in the Trash

In your Folder List, click ①.



- Select the item(s) you want to undelete.
- Click Edit > Undelete.

Tips

- The undeleted item is placed in the folder from which it was originally deleted. If the original folder no longer exists, the item is placed in your Mailbox.
- You can also restore an item by dragging it from the Trash folder to any other folder.

Saving an Item That Is in Your Trash

- In the Folder List, click ①. 1
- 2 Click the item you want to save.
- Click File ▶ Save As 3
- In the Save File As box, type a filename for the item.
- Click Browse to save the item in a different directory than is shown in the Current Directory box ▶ click **OK**.
- Click Save ► Close.

Tips

- When you save an item that is in your Trash, GroupWise provides a filename using the subject line with a .MLM extension. You can use this name or type a different filename in the Save File As box.
- To save items, you can also right-click the item ▶ click Save As to open the Save dialog box.
- To have GroupWise report any filename conflicts, select the Report Filename Conflicts check box.

Emptying the Trash

Click Edit ► Empty Trash ► Yes.

Tips

• You do not have to open the Trash folder to empty the Trash.

Emptying Selected Items from the Trash

In your Folder List, click ①.



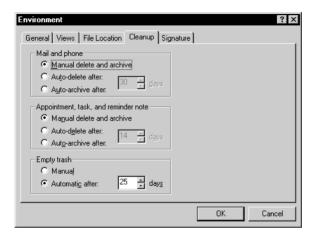
- Select one or more items. To select more than one item, press Ctrl while you click the items.
- Click Edit ► Delete ► Yes.

Tips

• Shift+click to select a range of items.

Emptying the Trash Automatically

- 1 Click Tools ▶ Options.
- **2** Double-click **Environment** ▶ click the **Cleanup** tab.
- 3 Select the Automatic After button in the Empty Trash box ▶ specify the number of days between automatic deletions.



4 Click OK.

Deleting Items from Your Mailbox

Use Delete to remove selected items from your Mailbox, selected text in an item, connections, and more. You can also use Delete to retract items you have sent. You can retract mail and phone messages if the recipients have not read them. You can retract appointments, reminder notes, and tasks at any time.

Deleting an Item from Your Mailbox

- 1 In the Main Window, click the item you want to delete. To select multiple items, Ctrl+click each item.
- 2 Click Edit ► Delete.

Tips

- When you delete outgoing items, the Delete Item dialog box appears. Select the appropriate Delete From option.
- You can also right-click items in the Main Window and click Delete.
- If you delete a document reference from your Mailbox, only the reference is deleted. The document remains in the Library.
- Deleted items are moved to your Trash, and remain there until the Trash is emptied. You can view or undelete items in your Trash.

Using the Address Book

Using the Address Book: An Overview

Use the Address Book like a phone book and information center for your addressing needs. The Address Book can store names and addresses, e-mail addresses, phone numbers, and more. You can also dial the phone from the Address Book.

You can create multiple address books for your personal use. Open address books are represented by tabs in the main Address Book window. You can display one address book at a time.

Address books can store e-mail addresses as well as Internet addresses. An e-mail address is the name a mail system uses to identify a person. Internet addresses resemble regular e-mail addresses but apply to the Internet, meaning that you can send and receive mail from locations outside of your organization. You can use Lightweight Directory Access Protocol (LDAP) providers to access address books on the Internet.

Searching for Users and Resources

You can quickly find entries in the displayed address book by using the Search List. You can also specify search criteria by defining one or more filters. For example, you can define a filter which displays only entries with last names that begin with "D."

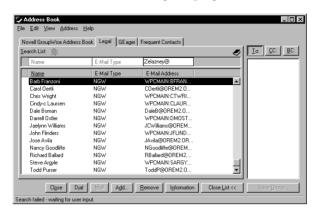
When you begin typing a name in the To, CC, or BC boxes of an item you are creating, Name Completion tries to complete the name for you. It searches the address books in the order you specify in the Name Completion Search Order dialog box for entries that match what you're typing.

If Name Completion finds the name you are looking for, you can stop typing. If Name Completion doesn't find it, continue typing: Name Completion searches again after each new character you type. If Name Completion finds a name that is close to but doesn't exactly match the one you are looking for, you can use the Up or Down arrows to scroll to adjacent names in the Address Book. You can tell Name Completion to search your address books in a specific order. However, Name Completion always searches the system address book last. You can also search Internet address books by using Lightweight Directory Access Protocol (LDAP). See *Using LDAP in the Address Book* under *Using the Address Book*.

Searching for User, Resource, Organization, and Group Addresses

- 1 Click 👺 on the toolbar.
- **2** Click the tab of the address book where you want to search for addresses.

3 In a Search List box, begin typing what you are searching for.



Tips

 Many columns in the Address Book have a Search List box. You can search for addresses using any Search List box. To narrow your search further, you can create a filter to tell the Address Book what you are looking for.

Using Filters to Narrow an Address Search

- 1 Click **2** on the toolbar.
- 2 Click View ▶ Define Custom Filter.



- 3 Click the first drop-down list ▶ specify the column you want to filter.
- 4 Click **№** specify an operator.

Type the parameter you want to filter by ▶ click OK.

Tips

An operator is a symbol that represents a mathematical operation. A parameter is a variable used with a command to indicate a specific value or option. For example, to create a filter that lists only users whose last name is Davis, click the **Last Name** column, click =, then type Davis. In this example, =Equals is the operator and Davis is the parameter:



- After a filter has been defined for an address book, you can enable the filter again later by displaying the address book in which you want to enable the filter and clicking View • Custom Filter.
- By selecting additional filter options in the last drop-down list, you can add rows to and delete rows from your filter. You can also use And and Or operators or New Group to further narrow the filter.

Defining Name Completion Search Order

- In the Address Book, click File Name Completion Search Order.
- In the Available Books box, click or Ctrl+click the books you want Name Completion to search ▶ click Add.
- To change the search order of an address book, select the address book click **Down** or **Up**.
- To disable Name Completion, deselect the Disable Name Completion check box.
- Click OK.

Tips

- To have Name Completion search a foreign address book, follow the steps above, selecting the foreign address book in Step 2, and placing it at the Selected Books list box in Step 3. To have Name Completion search the foreign address book first, place the foreign address book above the Frequent Contacts address book in the Selected Books box.
- To remove an address book from the search list, click the address book ▶ click Remove.

Using LDAP in the Address Book

The Address Book supports Lightweight Directory Access Protocol (LDAP) technology, thus allowing you to use address books in foreign directories, such as those on the Internet. With LDAP in place, you can search an Internet address book with potentially millions of names available each time you begin typing in the To field of a Send view.

Using LDAP in the Address Book

- You must first purchase or download an LDAP service provider and run its setup program. Make sure the foreign address book is in the search list for Name Completion. See Defining Name Completion Search Order under Searching for Users and Resources.
- Start typing a name in the To box or the Address Book Name box of the LDAP address book tab ▶ press Ctrl+Enter.

If you type in part of a name and GroupWise® completes the name for you, the highlighted text is included in your search when you press Ctrl+Enter. You may need to delete all or part of the highlighted portion of the name before pressing Ctrl+Enter.

Tips

- You can change an LDAP provider's properties from the Address Book. See Modifying LDAP Provider Properties from the Address Book
- When you press Ctrl+Enter, the Address Book goes out to the server you specified in the Properties dialog box and searches for names matching the information you've typed in the To or Name box.
- If there is one matching entry, LDAP places the entry in the appropriate box. If there are no entries matching your criteria, the criteria itself is entered into the appropriate box. If there are multiple entries matching your criteria, a dialog box appears with the entries listed. Select the entry or entries you want be click OK.

Modifying LDAP Provider Properties from the Address Book

- From the Address Book, click File > Services. 1
- Select the provider **\rightarrow** click **Properties**.
- Click the Connection tab type the name of the provider's server in the 3 Server Name box.
- Type the provider's server port in the Server Port box. The default port number for most providers is 389.
- Click the **Searching** tab type the search base in the Search Base box.
- Click OK.

Close GroupWise ► restart GroupWise.

Tips

- You must first purchase or download an LDAP service provider. If necessary, unzip it. Run the setup program. The setup program will guide you through the steps above.
- For help on the service providers, click the **Help** button on the tabs of the Directory Services dialog box.
- You can access the properties of your LDAP provider from Windows® through the Control Panel. Double-click the mail icon.

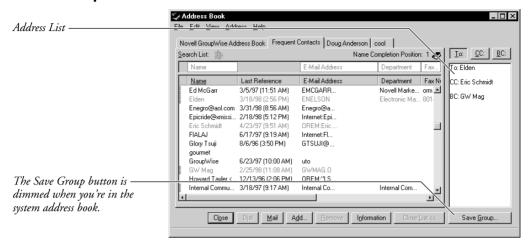
Using Groups to Address Items

A group is a list of users or resources you can send messages to. Use groups to send a message to several users or resources by typing the group name in the To, BC, or CC boxes. There are two types of groups: public and personal.

A public group is a list of users created by the system administrator and is available for use by each GroupWise® user. For example, there may be a public group for the Accounting Department. Each employee in Accounting is included in the group. Public groups are listed in the system address book. A personal group is a group created by you. For example, if you often send an appointment to your work group, you can include each co-worker's address or name and a meeting place (a resource) in a personal group. Groups are marked with the icon.

Creating and Saving a **Personal Group**

Click on the toolbar.



- If the Address List is not visible, click Address List.
- 3 Click To, CC, or BC • double-click or Ctrl+click and drag the users and resources for your group to the Address List.
- Click Save Group.
- Specify a name and personal address book for the group ▶ click OK.

Tips

- You can include users from different address books in one group. Groups are marked with the icon.
- You can save groups in personal address books only.
- You can save a group with any name you want. You can use spaces or any characters in the group name.

Addressing Items to a Group

- In an item view, click Address. 1
- 2 Select a group ► click To, CC, or BC.
- 3 Repeat as necessary.

Click **OK** to return to the item view.

Tips

- Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are open.
- Public groups are located in the system address book.

Adding and Removing Names from a Personal Group

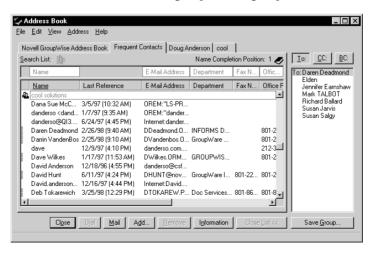
- Click **№** the tab of the address book the group is located in.
- 2 Select the group ► click **Edit** ► **Edit Group**.
- 3 Modify the group in the Address List ► click Save Group ► OK.

Tips

- To edit a group, you can also right-click the group entry in an address book > click Edit Group. Groups are marked by the
- The group entries appear in the Address List. You can double-click usernames in the address books to move them into the group or double-click usernames in the Address List to remove them from the group.

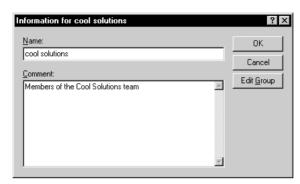
Viewing Group Information

- Click on the toolbar.
- To view the members of a group, click a group > click Edit > Edit Group.



The group is displayed in the Address List, where you can see the usernames. If it is a personal group, you can edit it. See Creating Personal Address Books under Using the Address Book.

To view a description of the group, select the group ▶ click **Information**.



Moving Addresses from One Address Book to Another

If another user has created a personal address book that would be useful to you, he or she can export a copy of it and send you the copy. You can then import the copy of the other user's personal address book instead of having to re-create the book from scratch. The other user could also share the personal address book with you. See Sharing a Personal Address Book with Another User under Setting Personal Address Book Properties.

Importing Addresses into a Personal Address Book

- If you have received a Novell® personal address book as an attachment, rightclick the attachment ► click Save As ► select the folder or floppy disk you want to save it to ▶ click Save.
- Open the address book you want to import addresses into. For steps, see Displaying Different Information in the Address Book under Using the Address Book.

or

Create a new personal address book to import the addresses into. For steps, see Creating Personal Address Books under Using the Address Book.

Click File ► Import.

Select the address book file ▶ click Open.

Tips

- To stop the import, press Esc ▶ click Yes.
- Novell Address Book files have a .NAB extension. They are ASCII files with specific formatting. If you want to import a non-Novell address book file, look at a .NAB file to determine its format, then mirror this format with your own address book's information.
- To change folders, click a folder in the Folders box. You cannot import addresses into the system address book.

Exporting Addresses from the Address Book

- 1 Open the address book from which you want to export names.
- Select the addresses you want to export.

If you want to export an entire address book, you don't need to select any names.

- 3 Click File ► Export.
- Click Entire Address Book if you want to export the entire address book.

Click **Selected Items** if you want to export the addresses you have selected.

Click a folder for the file to be saved to by type a filename for the exported file > click Save.

Tips

- To stop the export, press Esc ► click Yes.
- The exported file is saved with a .NAB extension (Novell Address Book).
- Ctrl+click to select multiple addresses.

Importing Non-Novell Address Books

- From your non-Novell® e-mail application, export the address book you 1 want to import into GroupWise.
- Open a DOS editor or Notepad open the non-Novell address book file.

You can also open the file in any word processor. To make editing easier, set the margins so that the lines do not wrap.

Export a small Novell address book. See Exporting Addresses from the Address Book above.

- Open the address book in a second copy or split window of the application used in Step 2.
- Cut, copy, and paste, or retype the fields for each entry from the non-Novell book into the Novell address book. Place each field behind the comma corresponding to the similar field in the first line of the Novell address book. Each field should be enclosed in quotes.

The order of the fields for each entry must correspond to the order of the fields in the first line of the Novell address book file. For example, if the Name field follows the first comma in the first line, the Name field information must also follow the first comma in the entry's line, for example: "U", "John Smith".

Each Novell address book entry starts with "C", "U", or "R". "C" is for company entries, "U" is for user entries, and "R" is for resource entries. In addition, groups are enclosed by "G>" and "G<" tags. This order (all "C" entries before "U" entries, and "U" entries before "R" entries) is important if you want user entries to be linked to their organizations and resource entries to be linked to their owners. Groups can go anywhere after company entries in this order.

When you are finished, the address book should look similar to this:

```
:::TAGMAP:::OFFE0003:***,3001001E:Name,3A06001E:First Name,3A11001E:Last Name,
"C", "Novell GroupWise", "Novell", "GroupWise",
"U", "John Smith", "John", "Smith",
"U", "Kenichi Aoki", "Kenichi", "Aoki",
"U", "Marina Sanchez", "Marina", "Sanchez",
"R", "Conference Room One",,,
"R", "Overhead Projector",,,
```

- Delete all extra spaces at the end of each line > save your formatted file with a .NAB extention.
- In GroupWise, open the Address Book.
- To import the entries into a new address book, click File New Book type a name ► click **OK**.

or

To import the entries into an existing book, open the book you want to import the names into.

Click File ► Import ► select the address book file ► click OK.

Tips

- Novell address book files are in ANSI-delimited format. In the first line, the characters up to the first comma must not be edited. Each field's title follows a comma. The hexadecimal numbers in each title represent the MAPI tags. User-defined fields may share the same hexadecimal number.
- If you want to leave a field blank for an entry, you must type the comma. This way you keep the fields lined up, so that, for example, all information following the tenth comma of each entry goes to the same field. There can be spaces inside of the quotes, but you must delete all spaces outside of the quotes.
- Each Group entry begins with a C, U, or R, and also contains a T (To or primary recipient), C (carbon-copy recipient), or B (blindcopy recipient). For example, a "UT" entry is a user who will receive an item as a primary recipient.

Displaying Different Information in the Address Book

You can control which address book tabs are displayed in the main Address Book window by opening and closing address books. For example, you may have a personal address book for an account that you deal with only six months out of the year. You can close it when you don't need it and open it again six months later.

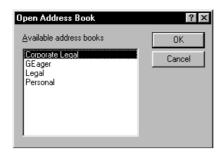
You can also control the information that is displayed in a single address book. In order for you to change displayed information in an address book, that address book must be opened.

Address books contain more information than can be displayed at one time. You can change what information is displayed at any time by selecting different column markers. You can also change column order, sort columns, or change their widths.

Opening and Closing Address Books

1 Click on the toolbar.

Click File ▶ Open Book.



If all of your address books are open, Open Book is dimmed.

- Click or Ctrl+click one or more address books ► click OK.
- To close an address book, click its tab ► File ► Close Book.

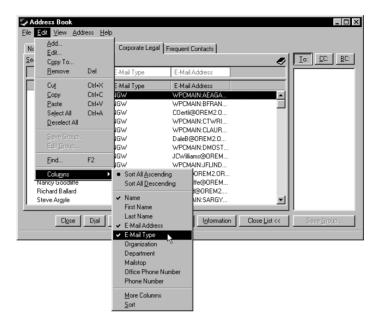
Tips

- When an address book is open, its name appears on a tab in the Address Book window.
- Closing an address book does not delete it; you can open it again at any time.
- You can open as many address books as you want. If you have more address books open than can be displayed on one line, click the arrows to the right of the tabs to display them.

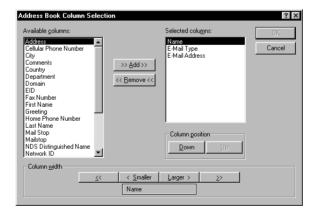
Specifying the Columns to Display in an Address Book

- Click on the toolbar.
- 2 Click the tab of the address book you want to change the displayed columns in.

Click Edit ► Columns ► click a column name on the menu to display it or remove it from display.



If the column name you want is not displayed, click **More Columns ►** click the column in the Selected Columns list box ► click **Add** or **Remove**.

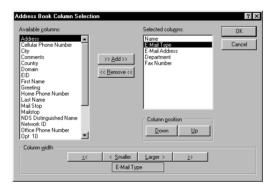


Tips

- To display another column of information, you can also right-click a column marker, then click a column name. To arrange columns, you can drag a column marker to another position.
- To remove a column marker, you can drag away the marker.
- You can select different column layouts for each address book.

Changing the Order of **Columns in the Address** Book

- Click on the toolbar. 1
- Click the tab of the address book you want to change the displayed columns 2
- 3 Drag a column heading to another position.



- To add a column, right-click a column heading click a column name.
- To remove a column, drag away the heading.

Tips

- You can Ctrl+click column headings in either list box, then click Add or Remove to move multiple columns at once.
- You can also move columns in the Available Columns dialog box. Click Edit ► Columns ► More Columns ► double-click column headings in the Available Columns list box or the Selected Columns list box to add or remove columns.
- You can select different column layouts for each address book.

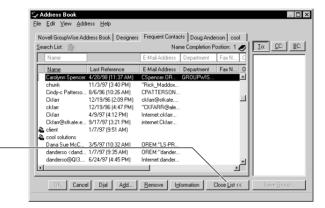
Using the Address Book to Send Messages

The Address Book makes sending mail messages, appointments, tasks, notes, and phone messages easier and faster by helping you find the e-mail addresses of the users you want to send an item to.

You can open an item view and then open Address Book to find addresses or you can open Address Book first and open an item from there.

Using the Address Book to Address an Item

- 1 In an item view, click Address.
- **2** Click an address book tab.



This button toggles between Close List and Address List.

3 If the To, CC, and BC boxes are not visible, click **Address List** at the bottom of the Address Book.

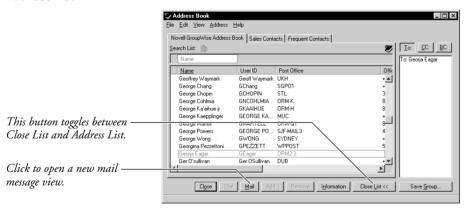
Double-click the names you want as primary (To) recipients of your message ► click CC ► double-click the names you want as carbon copy recipients ► repeat for blind copy recipients ► click Close.

Tips

- If you know the person's name, begin typing it in the To box of the item view. Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are listed in the Name Completion Search Order. When Name Completion finds the person you want to send a message to, you can stop typing. If Name Completion finds a name that is close to but doesn't exactly match the one you are looking for, use the Up or Down arrows to scroll to adjacent names in the Address Book.
- To find an entry in an address book, click a Search List box and begin typing. For example, begin typing a name in the Name column.
- You can also drag names to the Address List after clicking To, CC, or BC. To select one entry, click the entry. To select multiple entries, Ctrl+click them. To select all entries in the current address book (up to 1,000), click Edit ► Select All.

Sending Mail from the Address Book

Click on the toolbar.



- If the Address List is not visible, click Address List.
- Double-click the users you want to send mail to.

To open a mail message view, click Mail.

Tips

Users you specified are listed in the To, CC, and BC boxes in the item view.

Using Frequent Contacts

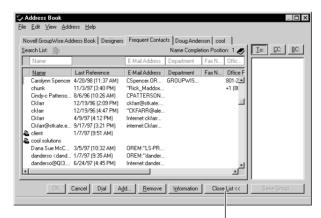
Use the Frequent Contacts tab in the Address Book to access your most frequently used or most recently used entries. When you use an entry in a message, the entry is copied to the Frequent Contacts address book if the book's options are set to do so. You can view the date and time you last used an entry and the number of times you have used it.

Once an entry is placed in Frequent Contacts, it remains there until you delete it from Frequent Contacts. The entry also remains in its original address book.

You can use Frequent Contacts Properties to decide which addresses to capture (if any) from either received or sent items, and how long you want addresses to remain in the address book before deleting them.

Using Frequent Contacts to Address Items

- 1 Open an item view.
- 2 Click Address.
- 3 If the Frequent Contacts tab is not displayed, click File > Open Book > Frequent Contacts > OK.



This button toggles between Close List and Address List.

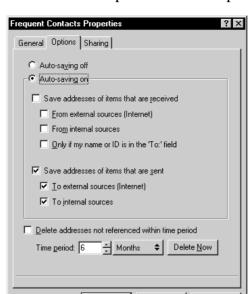
- If the To, CC, and BC boxes are not visible, click Address List at the bottom of the Address Book.
- Click To ▶ double-click the names you want as primary recipients of your message ► click CC ► double-click the names you want as carbon copy recipients ▶ repeat for blind copy recipients ▶ click OK.

Tips

- When you begin typing a name in the To, CC, or BC box, Name Completion searches the Frequent Contacts address book, the current address book, and the system address book, provided they are listed in the Name Completion Search Order dialog box. When Name Completion finds the person you want to send a message to, you can stop typing.
- You can remove address book columns or display other columns of information about entries. See Displaying Different Information in the Address Book under Using the Address Book.
- The Frequent Contacts address book can be closed, but it cannot be deleted.

Setting Frequent Contacts Properties

Click the tab of your Frequent Contacts book. If the tab is not visible, the book is not open.



2 Click File ▶ Properties ▶ click the Options tab.

- **3** Select the options you want.
- 4 To delete names from this book, select the Delete Addresses Not Referenced within Time Period check box ▶ type a number in the Time Period box ▶ click a time period from the drop-down list (from hours to years) ▶ click Delete Now to remove old addresses.
- 5 Click OK to save your changes and close the Properties dialog box.
 or

Cancel

Click Apply to save your changes and keep the Properties dialog box open.

Tips

- To open an address book, click File ➤ Open Book ➤ click the address book ➤ click OK.
- To turn off names being placed into the Frequent Contacts address book, click **Auto-Saving Off.**

Using Predefined Filters for the Frequent Contacts Address Book

- If you have not already opened the Address Book, open an item view ▶ click Address.
- 2 Click the Frequent Contacts tab.

- If there is no Frequent Contacts tab, you must open the Frequent Contacts book. For steps, see Displaying Different Information in the Address Book under *Using the Address Book*.
- Click View > Filter for at Least 3 References.

or

Click View ▶ Define Filter for References ▶ type a number ▶ click OK.

Tips

The number you type is the minimum number of references an entry must have in order to be included in the filter. A reference is the number of times you have sent or received items from an entry.

Creating Personal Address Books

A personal address book is one that you create for yourself to fit your particular needs. You can create, edit, and save any number of personal address books. You have full rights to add and delete names and address information for any person, company, or resource you want in your personal address books.

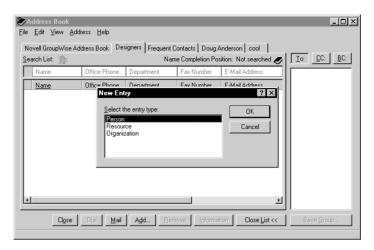
When you create a personal address book, a tab is added to the main Address Book window. When you create multiple address books, you can include the same name and address in several books. If the entry is copied from an address book and you edit the entry's information in one book, it is updated in all books.

Personal address books group addresses according to your preferences. You can include Internet addresses or no address at all for the people you add to your personal address books. You can send items to all entries in a personal address book by clicking the To box above the Address List, then clicking Edit ▶ Select All, or you can create a personal group. If you save a list of people as a group, you only need to type the group name in the To box of an open send view to send the entire group a message.

Creating a Personal Address Book

- Click on the toolbar.
- Click File ▶ New Book.
- Type a name for the new book ▶ click **OK**.

4 To add names to the new address book, click **Add**.



- **5** Click the Entry Type ► click **OK**.
- **6** Fill in the fields for the entry.
- 7 Click OK.

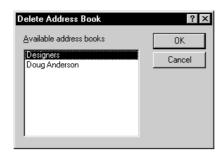
Tips

- You can copy names from existing address books into your new address book. See *Editing a Personal Address Book* later in this section.
- You can share a personal address book with other users. See Setting Personal Address Book Properties under Using the Address Book.
- You can add and modify records in your personal address books.
 However, only the system administrator can add and modify records in the system address book.

Deleting a Personal Address Book

1 Click on the toolbar.

Click File ▶ Delete Book.



Click or Ctrl+click the books you want to delete ▶ click OK ▶ Yes.

Tips

- You can delete only personal address books.
- You cannot undelete a deleted address book from the Trash. Once it is deleted, an address book cannot be recovered.

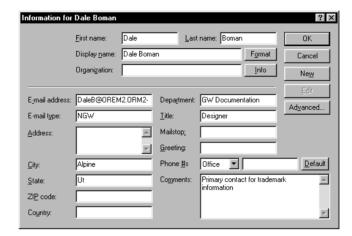
Editing a Personal Address Book

In a personal address book, you can add or delete entries, edit existing information, copy names from one book to another, or rename a book. You can also create your own information fields.

Editing Names and Addresses in a Personal Address Book

- Click on the toolbar.
- Click an address book tab ▶ click the name you want to edit.

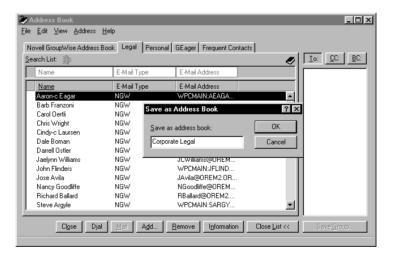
3 Click Edit ► Edit.



4 Edit the information ▶ click **OK**.

Copying Names to a New Personal Address Book

- 1 Click on the toolbar.
- **2** Open the address book you want to copy.
- 3 Click File ► Save as Book.



Address Book File Edit View Address Help Novell GroupWise Address Book | Corporate Legal | Legal | Personal | GEager | Frequent (▲ ▶ <u>I</u>o: <u>C</u>C: <u>B</u>C: 4 Name E-Mail Tune E-Mail ∆ddress E-Mail Type E-Mail Address Aaron-c Eagar WPCMAIN:AEAGA WPCMAIN:REBAN Carol Oertli NGW COerti@OREM2.0 Chris Wright WPCMAIN:CTWBL. NGW WPCMAIN:CLAUB. Cindv-c Laursen NGW DaleB@OREM2.0. NGW Darrell Ostler NGW WPCMAIN: DMOST Jaalunn Williams NGW JCW/illiame@OBEM WPCMAIN: IFLIND John Flinders NGW JAvila@OREM2.OR. Jose Avila NGW Nancy Goodliffe NGoodliffe@OBEM Richard Ballard RBallard@OREM2. NGW Steve Argyle NGW WPCMAIN:SARGY Mail Add... Remove Information Close <u>L</u>ist <<

Type a name for your address book in the box ▶ click **OK**.

The new address book is represented by a tab with the name you specified. It is also listed in the list of available address books.

Removing Names from a Personal Address Book

- Click on the toolbar.
- Click an address book tab click or Ctrl+click the names you want to remove.
- Click Remove ► Yes.

After you select names, you can also drag them off the address book to remove them, press the **Delete** key, or click **Edit** • **Remove**.

Synchronizing Address Book Entries

You can use Synchronize to make sure that your personal address book entries match the corresponding entries in the system address book. You can synchronize an entire personal address book or selected entries only.

For example, you may have a personal address book containing the names of your contacts in the Marketing department. When the Marketing department changes buildings and phone numbers, Synchronize saves you from having to create a new personal address book.

- Click the tab of the personal address book you want to synchronize.
- To synchronize an address book, click File > Synchronize > Current Book.

or

To synchronize selected entries, click the entries > click File > Synchronize ► Selected Items. You may also Ctrl+click or Shift+click the entries to select them.

Setting Personal Address Book Properties

Use the Address Book Properties dialog box to view the properties of each of your address books (including the system address book). There are three property tabs in the Address Book, not all of which are visible from every address book.

The General tab is visible from all address books. Use the General tab to view the name of the address book, the MAPI service provider (if known), a summary of what the address book contains, and so forth. You can also use it to add a description of the address book.

The Options tab is visible only from the Frequent Contacts address book. Use the Options tab to specify what gets saved in Frequent Contacts and how this address book should be cleaned up. See Using Frequent Contacts under Using the Address Book.

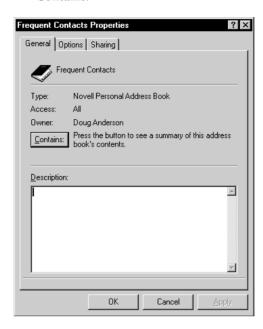
The Sharing tab is visible for personal address books for which you are the owner, including your Frequent Contacts book. Use the Sharing tab to choose whether or not to share an address book, who to share it with, and which Access rights each person should have.

You can also share your personal groups or distribution lists by placing them in an address book you share with others.

Viewing an Address Book's Properties

- Click the tab of the address book you want to view the properties of. If the tab is not visible, the book is not open.
- Click File ▶ Properties.

To view the number of individuals, resources, companies, and so forth, click Contains.



If the address book is large, this may take some time. The status bar measures the progress of this operation.

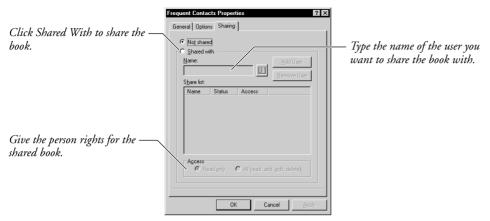
- To add or modify a description for the address book, click in the Description box ▶ type or edit the description.
- 5 Click **OK** to save your changes and close the Properties dialog box. Click **Apply** to apply your changes and keep the Properties dialog box open.

Sharing an Address Book with Another User

- Click the tab of the address book you want to share. If the tab is not visible, the book is not open.
- 2 Click File > Sharing.
- Click the Shared With radio button. 3
- Type the name of the person with whom you want to share the address book click Add User.

Name Completion works in the Name box. Begin typing the name, and Name Completion will complete it.

5 Click each user's name in the Share List ▶ assign him or her Access rights.



6 Click **OK** to save your changes and close the Properties dialog box. *or*

Click Apply to apply your changes and keep the Properties dialog box open.

Tips

- To remove a user from the Share List, click the user ➤ click Remove User
- When you click OK or Apply, the person with whom you want to share
 the address book receives a notification. The Status column displays as
 Pending until the user accepts or declines the shared address book request,
 then the column is updated to reflect the user's selection.
- You cannot share address books across external domains.

Viewing Groups, Organizations, or Resources in the Address Book

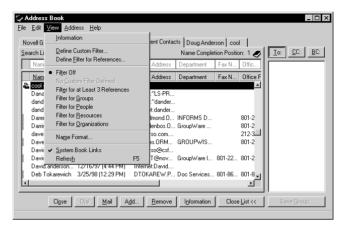
Use the predefined filters in the View menu to display only groups, users, organizations, or resources in an address book.

Address books display all entries by default. While all groups, companies, and resources are marked by icons, finding specific entries in large address books can prove difficult. A predefined filter displays only the type of entry you are looking for.

There are two predefined filters which apply only to the Frequent Contacts address book. You can use them to filter all entries with at least the number of references you specify.

To view groups, organizations, or resources in an address book,

- Click on the toolbar.
- Click View ▶ click the filter you want to display.



To return to the non-filtered address book view, click View > Filter Off.

Tips

- After a filter has been enabled, a black dot appears next to the Filter option on the View menu and Fappears in the upper-left corner of an address book tab.
- The predefined filters, Filter for at Least Three References and Configure Filter for References, apply only to the Frequent Contacts address book. They let you filter out entries with less than three references or let you set the minimum number of references an entry must have to be included in the filter.
- The non-filtered address book displays all users, resources, groups, and organizations.
- The Address Book places icons by resources, groups, and organizations in all address books:







Finding Items in Your Mailbox

Finding Items

Use Find to look for items that match the criteria you specify. You can tell Find where to look (which folders or document libraries, for example), and precisely which documents or messages to look for. You can save the results in a Find folder, where you can retrieve them any time you open the folder.

If you use GroupWise® Remote, you can find items in both your Remote and Master Mailboxes.

Finding an Item

Click on the toolbar.

You may need to click the plus sign (+) next to your user folder to expand the folder structure.



- To search for specific text, select Full Text or Subject in the first drop-down list ▶ type what you are looking for in the box.
- To search for a name, select From/Author or To/CC in the second dropdown list ▶ type the name in the box.
- Select each item type you are looking for ▶ select each item source you are looking for.
- To specify a date range, select the Created or Delivered Between check box type or select the dates.
- In the Look In list box, click the folders and/or libraries you want to search in.

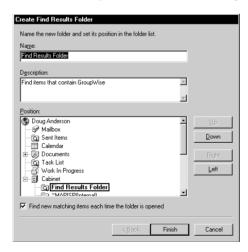
7 Click OK.

Tips

- The results of the search are displayed in the GroupWise Find Results folder, which opens when the search is completed.
- Use Advanced Find to make your search more specific. For example, you may want to search for messages from two or three users at once.
- Use Find Text rather than Find to look for text in an item you currently have open. See Finding Text in Items under Finding Items in Your Mailbox.
- For additional information about finding items, click Help ➤ Help Topics ➤ the Index tab ➤ type TIPS in the box ➤ press Enter to open the Find Quick Tips help topic.
- Select the Find Only Official Document Versions check box to locate only the official document version of a document containing multiple versions.
- Your folders and library are marked for search by default with a check in the box. Folders not marked contain dimmed boxes. To speed up your search, unmark any folders you don't want to search.

Saving the Results of a Find

- 1 Click on the toolbar.
- **2** Perform a Find. See *Finding an Item* above.
- 3 In the GroupWise Find Results dialog box, click File ➤ Save as Folder.



Type a name for the folder ▶ type a description for the folder ▶ click Up, **Down**, **Right**, or **Left** to place your folder where you want it to display click Finish.

Tips

- You can update a Find folder each time you open it. Make sure Find New Matching Items Each Time the Folder Is Opened is selected.
- The Find folder is placed in the Cabinet in the Folder List.
- To see your Find results at any time, select the folder.

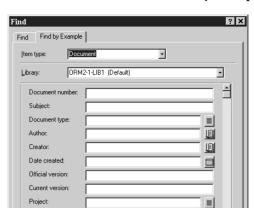
Finding an Item By Example

You can look for items, including documents, that match an example you specify in a field on the Find By Example tab. GroupWise finds all the items with fields that match the information you specify and displays them in the Find Results window. You can select any item type (mail message, document, appointment, task, or reminder note) to search. The fields on the Find By Example tab vary depending on the type of item you select.

Finding Documents By Example

When you use Find By Example to look for documents, GroupWise searches your default library. You can specify find criteria for system (document type, subject, and so on) and custom fields. GroupWise searches one library at a time.

The Find By Example tab is independent of the Find tab. This means information you specify on the Find tab will not appear in the Find By Example tab and vice versa.



Click Tools ► Find ► the Find By Example tab.

In the Item Type drop-down list, click the type of item you want to search

- If you selected Document in step 3, click the library you want to search in the Library drop-down list.
- In each field, specify the information you want to look for.
- Click **OK** to begin the Find.

Tips

Priority:

Find only official document versions

You can click **Revise Find** in the Find Results window to modify your search criteria and redo the find.

Finding a Document and Creating a Reference to It in Your Mailbox

- Click File ▶ New ▶ Document Reference. 1
- 2 Click Find.
- Click **Full Text** in the first drop-down list to search both the document properties and the document content, then type the text you want to find.

Click **Subject** in the first drop-down list to search just the document subject, then type the text you want to find.

If you know the name of the author of the document, click From/Author in the second drop-down list ▶ type the name.

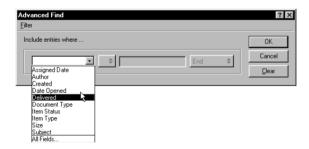
- In the Item Type group box, click **Document**.
- If you want to search all versions of the document, click Find Only Official Document Versions to deselect it.
- In the Look In list box, click the folders and libraries where you want to search for the document.
- 8 Click **OK** to begin the Find.
- In the GroupWise Find Results dialog box, click the document for which you want to create a document reference ▶ click OK.
 - GroupWise creates a document reference in the current folder.

Tips

The GroupWise Find Results dialog box only displays the documents to which you have at least View rights.

Looking for Multiple Words in Items Using Advanced Find

- Click on the toolbar.
- Click Advanced Find.
- Select a field in the first drop-down list ▶ click an operator ▶ type or select a condition.



Click **OK** if your filter is complete.

Click the last drop-down list be click And, Or, Insert Row, or New Group to add more filter criteria ▶ add more criteria for your filter ▶ click End from the last drop-down list ▶ OK.

Tips

- The results of the search are displayed in the GroupWise Find Results dialog box, which opens when the search is completed.
- Find searches all folders and libraries selected in the Look In box. To narrow your Find, deselect unnecessary folders and libraries.
- Use Find Text rather than Find to look for text in an item you currently have open.
- Click **Delete Row** in the last drop-down list to remove a row from your filter definition. You cannot delete a one-row filter.
- Click **Insert Row** in the last drop-down list to make your filter more specific. Additional rows narrow your search criteria even further. For example, to search for items from John Smith that were carboncopied to Mary Jones, the first row searches for John Smith. The second row searches for Mary Jones.

Using More than One Group of Rows in an Advanced Find

- Follow Steps 1-3 in Looking for Multiple Words in Items Using Advanced Find above.
- Click the last drop-down list click And, Or, Insert Row, or New Group to add more filter criteria ▶ add more criteria for your filter.
- Click **End** from the last drop-down list ▶ **OK**.

Tips

Click New Group in the last drop-down list to create a new row for a filter whose first group of rows contains several parameters for one column. For example, to create a filter to display all opened items from John Smith and Mary Jones, click From in the first drop-down list ▶ the = Matches operator ▶ type John Smith as the parameter ▶ click Or in the last drop-down list. A second row appears. Click From in the first drop-down list ► click the = Matches operator ► type Mary Jones as the parameter > click New Group. Click Item **Status** in the first drop-down list ▶ click the [] **Includes** operator ▶ click Opened in the third box ➤ click OK.

Narrowing an Advanced Find Using Filter Operators

When you click Advanced Find, the Advanced Find dialog box appears. Select the operator from the Operator drop-down list box . The list of available operators changes depending on the selection you make in the first box. Some operators, such as [], have two or more distinct names. While the name may change, the purpose of the operator remains the same. For example, the [] operator in the table below finds all items containing John in the From box or including a Sound file in the Attachment List. Click All Fields to see a list of all available fields, including user-defined fields.

Table of Operators

Operator	Include	Examples
[] Contains	All items containing the condition	From[]John, Attachment List[]Sound
-> Begins With	All items whose first text begins with the condition	Author> Karen
-> Within	All items falling within a range starting from a certain day forward	Created->5 Day (created within 5 days of today)
<- Previous	All items falling within a range previous to a certain day	Created <-5 Day (created 5 days or fewer previous to today)
= Matches, Equal To, Equal To Field, On	All items that equal the condition	Cc=Jill, Document Creator=JFerguson, Retrieved Date=Tomorro
! Does Not Include, Not Equal To, Not Equal To Field	All items except the condition	Item Status!Opened, Number Accepted!5
< Before,Less Than, Less Than Field	All items less than the condition	Retrieved Date <today, Document Number<1000</today,
<= On or Before, Less Than or Equal To, Less Than or Equal To Field	All items less than or equal to the condition	Retrieved Date<=Yesterday, Total Recipients<=10
> After, Greater Than, Greater Than Field	All items greater than the condition	Retrieved Date>This Week,Version Number>4.0
>= On or After, Greater Than or Equal To, Greater Than or Equal To Field	All items greater than or equal to the condition	Retrieved Date>=This Month, Number Replied>=7

Finding Text in Items

Use Find Text to search for a string of text in an item you are reading or sending. GroupWise searches only the text in the Message box or in an attachment that is open in the Viewer. You can also search for text in the QuickViewer. To find multiple words, or to search in multiple items, use Find in the Tools menu.

Finding Text in an Item

- 1 Open an item.
- Click Edit ▶ Find Text.
- Type the text you want to search for in the **Find What** box.



Click Find Next to search for the text you typed.

Tips

To search for items that contain specific text, use Find in the Tools menu. See Finding Items under Finding Items in Your Mailbox.

Filtering

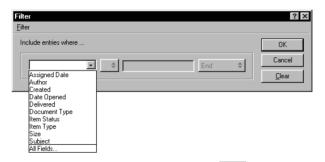
If your Mailbox contains many items, you might have a difficult time finding certain items. Filter lets you display items according to specific criteria. For example, a filter can display only items that have a certain word in the subject. You can also use a filter to hide items that you want to get out of your way.

Filter does not actually move or delete items; it displays certain items based on the criteria you specify. Filters you create affect all folders. Once you clear the filter, all the items reappear.

Displaying or Hiding Items in Your Mailbox **Using Filter**

- Click a folder (such as Mailbox, Trash, or a folder you have created). Filters affect all folders. By clicking a folder, you can see the filter results immediately.
- In the lower-right corner of the Main Window, double-click = .

In the first drop-down list, click the field you want to filter. For example, click From if you want to display items from a specific person. See Understanding Filter and Rule Fields later in this section for more information.



- Click the operator drop-down list click an operator. See *Using Filter* and Rule Operators later in this section for more information.
- Type the criteria for the filter.

or

If provided, click the drop-down list • click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive. See Using Filter and Rule Wildcard Characters and Switches later in this section for more information.

Click the last drop-down list ▶ click **End**.

Click the last drop-down list • click And or Or to narrow your filter by adding more filter criteria. See Narrowing Your Filter later in this section for more information.

Tips

- Read the text in the dialog box beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.
- The filter icon changes to indicating that a filter is active.
- To cancel the filter, click F Clear Filter.

Displaying or Hiding **Items in Your Calendar Using Filter**

- Click the Appointments, Reminder Notes, or Tasks List in a calendar view. 1
- In the lower-right corner of the calendar view, click Filter. 2
- In the first drop-down list, click the field you want to filter. For example, click From if you want to display items from a specific person. See Understanding Filter and Rule Fields later in this section for more information.
- Click the operator drop-down list click an operator. See *Using Filter* and Rule Operators later in this section for more information.
- Type the criteria for the filter.

or

If provided, click the drop-down list • click an existing criteria.

If you type criteria, such as a person's name or a subject, you can include wildcard characters such as an asterisk (*) or a question mark (?). Text you type is not case-sensitive. See *Using Filter and Rule Wildcard Characters and* Switches later in this section for more information.

Click the last drop-down list ▶ click **End**.

or

Click the last drop-down list • click **And** or **Or** to narrow your filter by adding more filter criteria. See *Narrowing Your Filter* later in this section for more information.

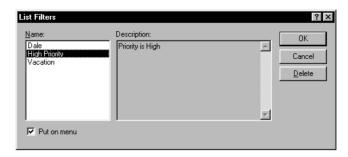
Tips

- Read the text in the dialog box beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.
- The filter applies to all lists in the calendar view. For example, if you click the Reminder Notes List in Step 1 above, the Appointments and Tasks Lists are also affected by the filter.
- The filter icon changes to **#** indicating that a filter is active.
- To cancel the filter, click F Clear Filter.

Using an Existing Filter

In the lower-right corner of the Main Window or Calendar View, click = ► Filter.

Click the **Filter** pull-down menu ▶ **Open**.



Click the filter you want to use ▶ OK.

Tips

If you've recently used a filter, you can select it by clicking View > Filter > the filter. GroupWise lists the four most recently used filters.

Clearing a Filter

In the lower-right corner of the Main Window, click Clear Filter.

Tips

- You can also right-click an item's subject in the filtered view, then click Clear Filter.
- After you've cleared a filter, the icon in the lower-right corner of the Main Window changes back to
- If the filter is saved, you can use it again by clicking View ▶ Filter ▶ Edit/Create ► Filter ► Open.

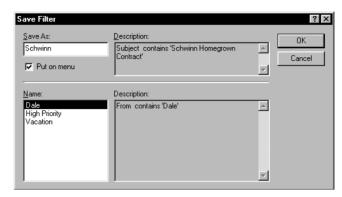
Deleting a Filter

- In the lower-right corner of the Main Window, double-click = .
- 2 Click the **Filter** pull-down menu ▶ **Open**.
- 3 Click the filter you want to delete ▶ Delete.

Saving a Filter

- In the lower-right corner of the Main Window or Calendar View, click Filter.
- Specify the filter criteria.

Click the **Filter** pull-down menu ▶ **Save**.



Type a name in the Save As box ▶ click OK.

Tips

- To access a saved filter, click Filter Open in the Filter dialog box.
- The Name box in the lower portion of the Save Filter dialog box lists all the filters you have saved. You can click any existing filter name and see its description in the Description box.
- Filters are not saved to a file on a drive; they are saved to your user database along with your mail messages, Options settings, and more.

Narrowing Your Filter

You may want to limit your filter further by specifying additional criteria. Each filter criteria is displayed in a separate row. The last button on each row lets you expand your filter criteria. The ways to add and delete rows to narrow your filter are explained below.

And

Creates a new row. The filter will display items that match the conditions in each row joined by And.

Or

Creates a new row. The filter will display items that match the conditions in either row joined by Or. The items don't have to match the conditions in both rows.

Insert Row

Inserts a new row below the current row and pushes the remaining rows down. Insert Row is useful if you've already created a filter, and you want to add more criteria in the middle.

Delete Row

Removes the current row from the filter.

Begins a new group of rows. You can then join the groups by an And or Or. If two groups are joined by And, the items must match all conditions in both groups. If two groups are joined by Or, the items must match all conditions in either group, but not necessarily both.

End

Designates the last row of conditions in the filter. If you select End in a row that is followed by other rows or groups, the subsequent rows and groups are deleted.

Using Filter and Rule Wildcard Characters and Switches

You can use the following wildcard characters and switches to narrow your filter or specify rule conditions. These are available in the Filter dialog box and the Define Conditions dialog box only when you've selected certain fields that require you to type additional text. For example, if you select the Subject field, you are required to type text that appears in the Subject box. Also, these wildcard characters and switches are applicable only when you select the [] Contains operator.

List of Wildcard Characters and Switches

Wildcard Character(s) and Switches	What the Filter or Rule Will Match
AND, &, or a space	All items that meet two or more conditions. For example, mountain & goat , mountain AND goat , and mountain goat all find items containing the words "mountain" and "goat."
OR or ¦	All items that meet one of two or more conditions. For example, mountain goat and mountain OR goat both find items containing "mountain" or "goat" or both words.
NOT or!	All items containing one condition but not the other. For example, mountain! goat and mountain NOT goat both find items containing the word "mountain" but not the word "goat." Items that contain both are not included.
n	All text found within quotation marks. For example, "mountain goats" finds all items containing the phrase "mountain goats." This does not work with documents or document references.
?	Matches any one character. For example, jo?n finds all items containing the word "john," "joan," "join," and so on.

Wildcard Character(s) and Switches	What the Filter or Rule Will Match
*	Matches zero or more characters. For example, mountain* finds all items containing the words "mountain," "mountains," "mountainous," and so on.
/NOCASE (default)	Items containing a specific word, regardless of case. For example, /NOCASE ZOO finds both "Zoo" and "zoo."
/CASE	Items that exactly match the case of a specific word. For example, /CASE Zoo finds "Zoo" but not "zoo."
/WILDCARD (default)	Items containing the search terms where * and ? are treated as wildcard characters. For example, /WILDCARD jo?n finds "john", "joan", and "join."
/NOWILDCARD	Items containing the search terms where * and ? are treated as characters. For example, /NOWILDCARD jo?n finds "jo?n."

Using Filter and Rule Operators

The following table explains the operators you can use when creating a filter or a rule. The available operators depend on the field you have selected in the first drop-down list.

Operator	Example	Result Includes
= Equal To	Item Type = Mail	Only mail messages
! Not Equal To	Item Type! Appointment	All item types except appointments
< Less Than	Number Accepted < 4	Items in which fewer than 4 recipients accepted
<= Less Than or Equal To	Number Accepted <= 4	Items in which 4 or fewer recipients accepted
> Greater Than	Number Read > 6	Items that more than 6 recipients read
>= Greater Than or Equal To	Number Read >= 6	Items that 6 or more recipients read
= Equal to Field	Number Accepted = Total Recipients	Items in which the number of recipients that accepted equals the total number of recipients

Operator	Example	Result Includes
! Not Equal to Field	Number Read! Number Accepted	Items in which the number of recipients who read the item is not equal to the number of recipients who accepted
< Less Than Field	Number Opened < Total Recipients	Items in which the number of recipients who opened the item is less than the total number of recipients
<= Less Than or Equal to Field	Number Opened <= Total Recipients	Items in which the number of recipients who opened the item is less than or equal to the total number of recipients
> Greater Than Field	Number Opened > Number Deleted	Items in which the number of recipients who've opened the item is greater than the number of recipients who've deleted the item
>= Greater Than or Equal to Field	Number Opened >= Number Deleted	Items in which the number of recipients who've opened the item is greater than or equal to the number of recipients who've deleted the item
[] Includes	Item Status [] Completed	Items which have been completed
! Does Not Include	Item Status! Accepted	Items which have not been accepted
[] Contains	From [] Bill	Items in which the From field contains "Bill" such as items from Bill Jones, Bill Smith, and so on. Contains does not support wildcard characters.
-> Begins With	To -> cli	Items in which the To field begins with "cli" such as "Client Group" or "Clive Winters"
= Matches	Subject = customer reports	Items in which the Subject line reads "Customer Reports"

Operator	Example	Result Includes
= On	Created = Today	Items that were sent today
>= On or After	Created >= Yesterday	Items that were sent yesterday or later
> After	Created > Yesterday	Items that were sent later than but not including yesterday
< Before	Due/End Date < Tomorrow	Tasks that are due before tomorrow
<= On or Before	Due/End Date <= Tomorrow	Tasks that are due tomorrow or earlier
-> Within	Due/End Date -> 3 Day	Tasks that are due between and including today and three days after today
<- Previous	Due/End Date <- 3 Day	Tasks that were due between and including today and three days before today
= On Date	Created = 5/29/99	Items that were created on May 29, 1999
> After Date	Created > 5/29/99	Items that were created after May 29, 1999
>= On or After Date	Created >= 5/29/99	Items that were created on or after May 29, 1999
< Before Date	Created < 5/29/99	Items that were created before May 29, 1999
<= On or Before Date	Created <= 5/29/99	Items that were created on or before May 29, 1999

Understanding Filter and Rule Fields

The following table explains many of the fields available to you when you're creating a filter or a rule; however, it does not include user-defined fields.

· ·	•	
Field Name	This Field Refers to:	Field Criteria Entry
Assigned Date	The start date of a task. This is the date the task begins appearing on your Calendar. This date does not change when your task is carried forward a day.	Depending on the operator, you can specify a time period, select a period of time that the task falls within, or specify an exact date.
Attachment List	Types of attachments such as files, sounds, movies, or OLE objects.	Select an attachment from the drop-down list.

Field Name	This Field Refers to:	Field Criteria Entry
Attachments	Attachments containing certain text or phrases that you specify.	Type attachment text.
Author	The name of the person who authored a document.	Type the document author's name.
BC	Text appearing in the BC box of an item.	Type a BC recipient name.
Caller's Company	Text appearing in the Caller's Company box of a phone message.	Type a company name.
Caller's Name	Text appearing in the Caller box of a phone message.	Type a caller name.
Caller's Phone Number	A phone number appearing in the Phone box of a phone message.	Type a phone number.
CC	Text appearing in the CC box of an item.	Type a CC recipient name.
Сору Туре	The type of message a user receives (To, CC, or BC).	Select To, CC, or BC from the drop-down list.
Created	The date you clicked the Send button. Also refers to the date you posted a posted item to your Calendar.	Depending on the operator, you can specify a time period, select a period of time that the item falls within, or specify an exact date.
Current File	The name of a document in the staging directory when the document is opened or checked out. (The staging directory is a temporary directory where GroupWise stores documents while you have them open.)	Type a document name.
Current Location	The pathname to the staging directory when the document is opened or checked out.	Type a staging directory pathname.

Field Name	This Field Refers to:	Field Criteria Entry
Date Opened	The date a document was last opened.	Depending on the operator, you can specify a time period, select a period of time that the document falls within, or specify an exact date.
Delivered	The date and time that the item appeared in the recipients' Mailboxes.	Depending on the operator, you can specify a time period, select a period of time that the item falls within, or specify an exact date.
Document Creator	The name of the person who created the document.	Type the document creator's name.
Document Number	The number of a document.	Type an integer.
Document Type	The type of a document in the library such as a form, expense report, memo, and so forth.	Type a document type.
Due / End Date	The date that a task is due, or the end date and time of an appointment.	Depending on the operator, you can specify a time period, select a period of time that the task or appointment falls within, or specify an exact date.
Filename Extension	The filename extension of a document in a library.	Type a filename extension (for example, .DOC).
From	The name of a person in the From box of an item.	Type the From box name.
Item Source	Whether the item was received, sent, posted, or a draft.	Select the item source from the drop-down list.
Item Status	Whether an item has been accepted, completed, opened, read, marked private, or is hidden.	Select the item status from the drop-down list.

Field Name	This Field Refers to:	Field Criteria Entry
Item Type	Types of items such as mail messages, appointments, tasks, and so on.	Select the item type from the drop-down list.
Library	The library in which documents are stored.	Select the library from the drop-down list.
Message	Text appearing in the Message box of an item.	Type part or all of the Message box text.
Message Class	Other items such as forms, custom messages, and C3PO™s.	
Number Accepted	The number of recipients that have accepted an item you've sent.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Accepted Equal to Total Recipients.
Number Completed	The number of recipients that have completed an item you've sent.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Completed Equal to Total Recipients.
Number Deleted	The number of recipients that have deleted an item you've sent.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Deleted Equal to Total Recipients.
Number Opened	The number of recipients that have opened an item you've sent.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Opened Equal to Total Recipients.

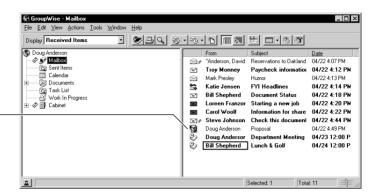
Field Name	This Field Refers to:	Field Criteria Entry
Number Replied	The number of recipients that have replied to an item you've sent.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Replied Equal to Total Recipients.
Opened By	The name of the person who last opened this version of a document.	Type a name.
Place	Text appearing in the Place box of an appointment.	Type part or all of the Place box text.
Priority	The priority of an item. The priority can be high, standard, or low.	Select the priority from the drop-down list.
Send Options	Items with a reply requested send option.	Select the option from the drop-down list.
Size	The size of an item including its attachments.	Type an integer.
Started	The start date of a task. When a task is carried forward to the next day, the start date becomes the new date.	Depending on the operator, you can specify a time period, select a period of time that the task falls within, or specify an exact date.
Subject	Text appearing in the Subject box of an item.	Type part or all of the Subject box text.
Task Category	The alphabetical priority of a task (A, B, C, and so on).	Type a single letter.
Task Priority	The numerical priority of a task (1, 2, 3, and so on).	Type an integer.
То	A person's name appearing in the To box of an item.	Type a To box name.

Field Name	This Field Refers to:	Field Criteria Entry
Total Recipients	The total number of recipients of an item.	Depending on the operator, you can type an integer or select a variable from the dropdown list. For example, Number Accepted Equal to Total Recipients.
Version Created Date	The date a specific version of a document was created.	Depending on the operator, you can specify a time period, select a period of time that the document falls within, or specify an exact date.
Version Creator	The name of the person who created this version of a document.	Type the document creator's name.
Version Description	The description of the document version.	Type a document version description.
Version Number	The version number of the document.	Select the version from the drop-down list, or click Select Version and specify the version number.
Version Status	The current status of a document.	Select a status from the drop-down list.
View Name	The name of the view in which you're creating or reading an item. The view names correspond to the names displayed when you click the down-arrow next to the item view buttons on the toolbar.	Type a view name.

Creating and Working with Documents

Managing Your Documents in GroupWise

GroupWise® Library lets you manage all your documents from your Mailbox. In GroupWise, your documents display as items in your Mailbox and folders along with your mail messages, tasks, appointments, and so on.



Double-click the document reference to open the document. The icon shows which application the document was created in.

You can select a document reference to create, delete, check out, check in, open, move, or copy the corresponding document.

In addition, GroupWise Library makes it easy to maintain multiple versions of a document, determine who has access to a document, and share a document with others.

Storing Documents in Libraries

In GroupWise, all of your documents are stored in a library. GroupWise assigns a unique number to each document. This number identifies the document and makes it easy to find. You can look up a document in GroupWise Library by its document number much like you can look up a book in a library by its catalog number.

In each library, the documents are compressed and encrypted. This saves disk space and maintains the security of documents because it makes it impossible to view the contents of documents outside of GroupWise.

Before you can access any of the documents in a library, you must first have rights to the library. Your system administrator determines which people have access to each library.

Once you have imported or created a document in the GroupWise Library, you can only access that document from GroupWise. This keeps your documents secure. If you need to share the document with a user who does not have access to GroupWise, you can attach the document reference to a mail message and send it to that user, or you can click File > Save As to save the document in an external file, outside the GroupWise Library. In either case, the file is not updated with any changes made to the document in GroupWise and is not controlled by the sharing rights assigned in GroupWise.

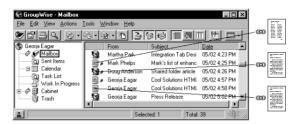
Specifying a Default Library

The default library is where all your documents are stored, unless you specify a different library, and where Find searches for documents by default.

- 1 Click Tools ➤ Options ➤ double-click Documents.
- **2** Click the library you want to use as a default.
- 3 Click Set Default ▶ click OK.

Understanding Document References

The document items that appear in your Mailbox (and other folders) are called document references. These document references are links to the actual documents in the library.



Document references are created when you create a new document, import a document, copy a document, select a document from the results of a Find, or click File New Document Reference.

You can select a reference to check out, check in, open, view, copy, or delete the corresponding document. Multiple document references can point to the same document. For example, each employee in a company could create a reference to the employee handbook.

Sharing Document References with Other Users

If you are the author of a document or if you have share rights to the document, you can post the document reference in a shared folder and make it available to all users who have access to the folder. In addition, you can attach document references to send the document reference to another user.

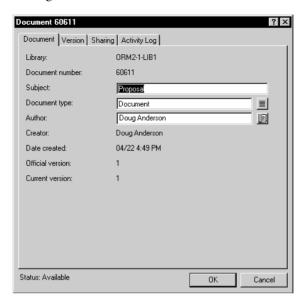
Document References and Remote

If you use Remote, updating your Remote Mailbox always gives you all of the document references, unless you choose to have none. You can use the document references to retrieve copies of the documents into your Remote Mailbox.

Specifying Document Properties

Every document in GroupWise must have a set of attributes associated with it, such as the author's name, the creation date, and the document type. These attributes are called document properties. The document property information is used for finding and categorizing documents.

You can use the Document tab in Properties to view version information for the specific version of a document, view the document activity history, and control sharing of the document with other users.



You can determine which fields display on the Document tab in Properties and customize their size and order using the options in the Library Setup Properties dialog box. To open this dialog box, click Tools ▶ Options ▶ double-click Documents ► click Properties.

Specifying a Default Value for a Document Properties Field

A default value is information (author, subject, and so on) that is automatically inserted in the corresponding document property field for every document you add to the selected library.

You can specify default values for the document property fields that can be edited. The default values are used when you create a new document or import a document into the selected library. If no default values have been specified for Author and Document Type, GroupWise uses the creator's name as the author and Document as the Document Type.

- Click Tools ▶ Options ▶ double-click Documents.
- Click the library for which you want to specify default values.
- Click Properties click the Document Defaults tab.
- Click a field by type the default value. For example, you could type your name as the default value for the Author field.

Tips

•Field names that are indented under another field are related to that field. For example, the "parent" field might be project name and the "child" fields might be the sub-project names. If you want to specify a default value for a child field, you must first specify a default value for its parent field.

Understanding Document Types

Document type is a required property field for all documents in a GroupWise Library. When you create a document in GroupWise you must select a document type. The document type determines the life of the document in days. By default, a document's life is 365 days; however, your system administrator can specify a document life as long as 2.1 billion days.

When a document expires the document type determines whether the document is archived, deleted, or retained.

Document expiration is based on inactivity. For example, if a document's life is 365 days, the document won't be archived or deleted until 365 days have passed since the last time it was viewed or opened. You can prolong the life of a document that is close to its expiration date by viewing or opening the document. This resets the document's expiration date.

Creating Documents

When you create a document in GroupWise, you are adding a document to the library. You can also add documents to the library by importing, copying, or checking in an existing document.

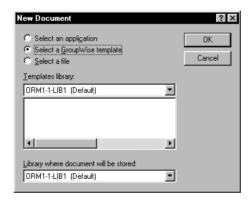
When you create a new document using File ▶ New ▶ Document, GroupWise prompts you to select a template for the document. You can use an application's template, a GroupWise template, or a file on disk as the foundation for your new document.

Templates	Description
Application Templates	You can select an application to create a document
	based on the application's template file. The
	Applications list box lists all the applications that
	are registered as having templates in your
	Windows® registry file.

Templates	Description
GroupWise Templates	You can select GroupWise templates to use a document in the library as the foundation of a new document. You can store documents (such as memos or expense reports) in GroupWise and assign them a document type of template. All the documents in the library with a document type of template (that you have rights to) appear in the Templates Library list.
Files as Templates	File templates are documents that are not in the library. You can select a file anywhere on your system and use it as a foundation for a new document.

Creating a Document Using a GroupWise Template

Click File ▶ New ▶ Document.



- Click **Select a GroupWise Template** ▶ select a template in the list box. To select a template from a different library, click the library in the dropdown list.
- Click OK.



Type the subject of the document ▶ click OK.

To specify additional information about the document, such as author name or document type, click **Properties** after you type the subject.

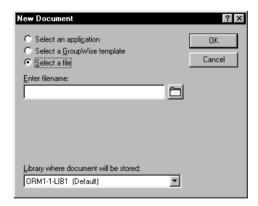
Double-click the document reference in the current folder to open the new document.

Tips

- You can click Open Document Now to immediately open the document.
- When you're in your Remote Mailbox, you can't see the values that are available for custom fields in your Master Mailbox. For example, if your system administrator defined a custom field called Client, you can select a client name from a list of values when you're in your Master Mailbox, but when you're in your Remote Mailbox, the list of values does not display. As a result, you have to manually enter the client name.

Creating a Document Using a File as a **Template**

- Click File ▶ New ▶ Document.
- Click Select a File.



Type the name of the file you want to use as a template for the new document.

You can also click the Browse button to find the file.

- Click OK. 4
- Type a subject.

To specify additional information about the document, such as author name or document type, click **Properties** after you type the subject.

Click OK.

Creating a Document Using an Application's Template

You can create a document using an application's default template. For example, you can select Word to create a new Word document, or you can select WordPerfect to create a new WordPerfect document.

- Click File ▶ New ▶ Document.
- Click Select an Application ▶ click the application you want to use as a template in the Applications list box ► click OK.
- Type a subject for the document. To specify additional information about the document, such as author or document type, click Properties after you type the subject.
- Click **OK**.

Tips

The Applications list box contains all the applications that are registered as having templates in your Windows registry file.

Making Any Document a Template

- Click the document reference in your Mailbox.
- 2 Click File ▶ Properties.
- In the Document Type box, type template ▶ click OK.

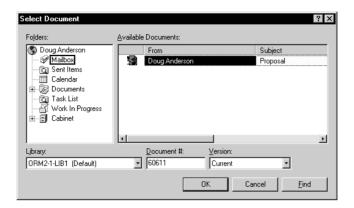
Tips

All documents with the document type of Template appear in the Templates list in the New Documents dialog box.

Creating a Reference to a Document

If a document already exists in the library, you just create a reference for it in your Mailbox.





- 2 In the Library drop-down list, click the library that contains the document you want to access.
- **3** In the Document # box, type the document number.
- 4 In the Version drop-down list, click the version you want the document reference to point to.
- 5 Click OK.

Tips

• If you don't know the number of the document, click Find on the Select Document dialog box to use Find to locate the document. To add the document displayed in the Find results to your Mailbox, click the document • Edit • Move/Link to Folder.

Organizing Your Documents

Your document references are organized in the Documents folder so you can locate them easily. This folder is a system folder and cannot be deleted. The first time you start GroupWise 5.5, three things will happen:

- The 20 most recent document references from your Work in Progress folder will be moved to the Documents folder.
- If you have more than 20 document references in your Work in Progress folder, the oldest document references will be deleted.
- If you already had a folder named Documents, it will be renamed More Documents.

- Any document references you create or open will be added to the Documents folder; if you so specify, any document references you view or import will also be added.
- You can also specify that none of these actions adds a document reference to the Documents folder. The Work in Progress folder will no longer contain any document references automatically.

The Documents folder can contain only documents. If any other type of item is moved to this folder by a non-GroupWise 5.5 client (for example, from an older version of GroupWise Remote), the item will eventually be deleted as described

The Documents folder will contain, by default, your 20 most recent document references. You can change this number from 0 to 5000 document references. Once the maximum number is reached, an additional document reference added to the Documents folder will cause the oldest document reference to be deleted. You can also delete document references from the Documents folder manually.

Find Folders

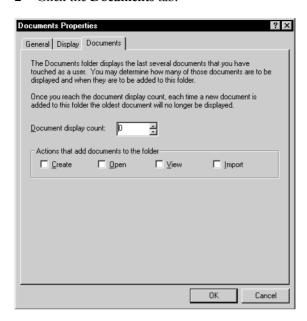
The Documents folder has two Find folders. Authored contains document references for all the documents which you are the author of.



Default Library contains document references for all the documents you have access to in the default library. You can change or delete the Author and Default Library folders. You can create other document Find folders according to your needs. For example, you can create a Find folder for a specific library, subject, author, or document type.

Specifying When Document References Are Added to the Documents Folder

- 1 Right-click the **Documents** folder ▶ click **Properties**.
- 2 Click the Documents tab.



3 Select the check boxes to indicate which actions will add document references to the Documents folder.

Tips

- Selecting View as an action will place any document reference in the Documents folder that were viewed with the Viewer, not with the QuickViewer.
- If you leave all the check boxes unchecked, no document references will be placed in the Documents folder.
- By default, the Create and Open actions are checked. This means document references will be placed in the Documents folder when you create or open them.

Changing the Maximum Number of References in the Documents Folder

- **1** Right-click the **Documents** folder ▶ click **Properties**.
- **2** Click the **Documents** tab.

Type a number in the Number of Documents to Display box.

Tips

- If you don't want any document references placed in the Documents folder, type 0.
- The maximum number you can specify is 5000.
- Once the maximum number is reached, an additional document reference added to the Documents folder will cause the oldest document reference to be deleted.

Importing Documents into a GroupWise Library

You can import documents created outside of GroupWise into GroupWise Library using the Import Documents wizard.

Specifying Files to Import

When you specify the documents you want to import, you can select individual files, or you can select one or more folders and import all the documents in those folders. This makes it easy to import large numbers of documents without having to select each document individually.

Importing Folders

When you import a folder, GroupWise imports the documents in the folder; however, GroupWise does not import the folder itself or the folder structure. The folders aren't imported because documents in GroupWise Library are not stored in a folder structure, and so the folders have no meaning in the library.

When you import documents in a folder, you can specify whether you want to import all, some, or none, of the documents that are contained in the folder's sub-folders. In addition, you can specify which types of files, such as Word or WordPerfect, you want to import by specifying the file extensions in the File Name Filter box.

Choosing an Import Method

By default, GroupWise performs a Quick Import and copies the documents you specify into your default library. If you want to have more control over how your documents are imported, deselect the Quick Import check box. This lets you perform a custom import.

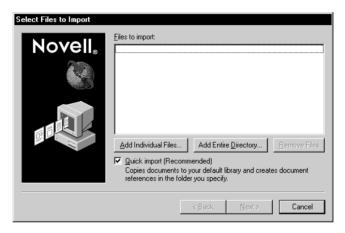
When you perform a custom import you can specify the following information:

- Whether you want to copy or move the documents into the library.
- The filename and location of a log file for import status messages and errors.
- The library where you want to store the documents.

- Whether or not you want to create document references in a folder. If you create document references, you can specify the folder in which to store them.
- Whether you want to specify document properties for each document individually or have GroupWise create document properties using the default values.
- Whether or not the current filenames will be used as part of the document subject.

Importing Documents Using Quick Import

Click File • Import Documents.

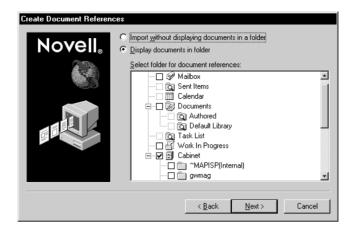


Click Add Individual Files ▶ select the files you want to import ▶ click OK. (To select multiple files to import, **Ctrl**+click each additional document.)

Click Add Entire Directory • select the folder or folders that contain the documents you want to import.

Type a file extension, such as *.doc or *.wpd, in the File Name Filter box if you want to import specific types of files from the selected folder or folders > click OK.

3 Click Next.



If you want GroupWise to create document references for each document, click Display Documents in Folder > click the folder where you want to store the document references.

If you do not want to create document references, click **Import without** Displaying Documents in a Folder.

If you don't create document references during the import, you can create them later using File • New • Document Reference.

Click Finish to begin the import.

GroupWise copies the documents into the specified library and creates a document reference for each document in the Cabinet folder.

Tips

- You can also import a document by dragging it from a window or your desktop to a GroupWise folder.
- To remove a file from the Files to Import list, click the file Remove Files.

Importing Documents Using Custom Import

- Click File ► Import Documents.
- 2 Click Add Individual Files ▶ select the files you want to import ▶ click OK. (To select multiple files to import, Ctrl+click each additional document.)

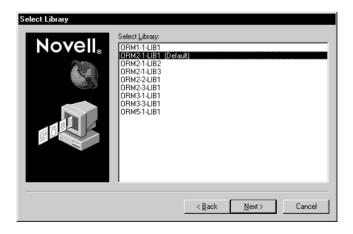
Click File ▶ select the folder or folders you want to import.

Type a file extension, such as *.doc or *.wpd, in the File Name Filter box if you want import specific types of files from the selected folder or folders > click OK.

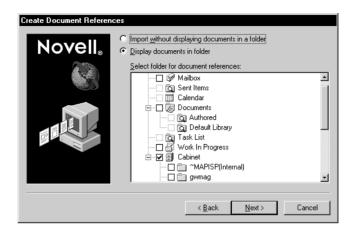
- Make sure **Quick Import** is deselected.
- Click Next.



- Click Copy Files into GroupWise to place a copy of the files in the library and leave the original files in the source location.
 - Click Move Files into GroupWise to move the files into the library and delete the original files from the source location.
- To save any import errors in a log file, click Store All Status and Error Messages in a Log File ▶ specify a filename.
- Click Next.



- Click the library you want to store the documents in.
- Click Next.



10 If you want GroupWise to create document references for each document, click Display Documents in Folder > click the folder where you want to store them.

If you do not want to create document references, click Import without Displaying Documents in a Folder.

11 Click Next.



12 To specify properties for each document you are importing, click **Prompt for** Properties of Each Document Individually.

To have GroupWise specify properties based on the default property values specified in Document options, click Set Properties Using Default Values.

- **13** If you want to specify different default values for this import session only, click Modify Default Values ▶ specify the values ▶ click OK.
- 14 Click Next.
- **15** Click **Finish** to begin the import.

Sharing Documents

When you create or import a document in GroupWise you can specify whether you want to share the document with other users. If you share a document, you can specify which users or group you want to share the document with and what rights each user will have. In addition, you can specify which sharing rights, if any, you want GroupWise to automatically apply to all the documents you create.

When you create a new document, GroupWise inserts <General User> and <Creator> in the Share List. By default, general users (all users with access to the library) do not have any rights to the document and the author and creator have full rights to the document. You can use the <General User> entry to grant the same rights to all users who have access to the library, and you, assuming you're the author of the document, can use the <Creator> entry to limit the rights of the creator.

For example, say that your secretary creates several blank performance review documents in the library, one for each employee in your team, and specifies you as the author of each document. This gives you full rights to each document because you're the author; however, this also gives your secretary full rights to each document because he created them. Of course, you don't want your secretary to be able to read everyone's performance reviews, so you could use the <Creator> entry to remove your secretary's rights to the performance review documents.

Specifying Users Who Can Share the Document

You can use the options on the Sharing tab in Properties to give sharing rights to a document. You can use one of the following methods to give sharing rights:

- You can click Not Shared to prevent other users from viewing, editing, or deleting the document.
- You can click Shared With to select specific users and groups and specify sharing rights for each user or group.

When a user tries to access a document, GroupWise checks the rights of the individual user. If the user doesn't have rights to the document, GroupWise checks for any rights the user inherits as a member of a group. If the user doesn't have rights to the document as a member of a group, GroupWise checks the rights given to <General User>.

• You can click Shared With and then click Version Level Security to give users different rights for each version of the document.

Specifying Default Sharing Rights for Documents

If you typically share your documents with the same user or groups of users, you can use the Sharing Defaults tab to specify default sharing rights for all the documents you create. Once you have specified default sharing rights, GroupWise applies these rights to every document you create or import into the library.

If you don't specify any default sharing rights, the documents you create or import are not shared, which means that only the author and the creator have rights to the document.

Default sharing rights only apply to the documents you create in the selected library. If you create documents in multiple libraries, you must specify default sharing rights for each library.

- Click Tools ▶ Options ▶ double-click Documents.
- Click the library for which you want to specify default sharing rights.
- Click **Properties** ▶ the **Sharing** tab.
- Click Shared With.
- In the Name box, type the name of the user or group you want to grant rights to ▶ click Add User.
- Click a user or group in the Share List.
- Select the check boxes for the rights you want to grant to the selected user or group.
- Click OK.

Default Sharing Rights and Proxy

If a proxy creates a document in your Mailbox, the new document receives the default sharing rights the proxy specified in his or her Mailbox, not the default sharing rights you specified in your Mailbox.

Default Sharing Rights and Remote

You can specify default sharing rights in your Remote Mailbox; however, the default sharing rights you specify in Remote only affect the documents while they are stored in your Remote Library.

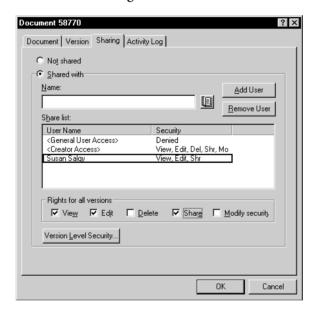
Specifying Users' Rights to the Document

You can give users rights to view, edit, delete, or share a document. When you give users rights to share a document, they can put the document in a shared folder. You can also give users rights to modify the security settings for a document. To have Modify Sharing rights, a user must also have Edit rights. The rights you specify are for all versions of a document. If you want to specify different rights for each version of a document, click the Version Level Security button.

When you grant users Edit or Delete rights, GroupWise automatically gives them View rights to the document. If users don't have View rights, they can't see the document in the results of a Find.

Giving a User Rights for All Document Versions

- 1 Click the document reference in your Mailbox.
- 2 Click File **Properties**.
- Click the **Sharing** tab.



- Click Shared With.
- 5 In the Name box, type the name of the user or group you want to grant rights to ▶ click Add User.
- Click the user's name in the Share List ▶ select the check boxes for the rights you want to grant to this user.

Click OK.

Tips

Users must have Share rights to put the document reference in a shared folder.

Giving a User Rights to a Specific Document Version

- Click the document reference in your Mailbox.
- 2 Click File ▶ Properties.
- 3 Click the **Sharing** tab.
- 4 Click Shared With.
- In the Name box, type the name of the user or group you want to grant rights to be click Add User.
- Click the user's name in the Share List > click Version Level Security.



Select the check box for each right you want the user to have for the version type ► click OK ► OK.

Tips

- You must be the author or the creator of a document to grant access rights, or the author or creator of the document must grant you rights to modify security for the document.
- Users must have sharing rights to put the document reference in a shared folder.

Giving Users Rights to Modify the Sharing Settings for a **Document**

- 1 Click the document reference in your Mailbox.
- 2 Click File ▶ Properties.
- 3 Click the **Sharing** tab.
- Click Shared With.

- In the Name box, type the name of the person or group you want to grant Modify Security rights to ▶ click **Add User**.
- Click the user's name in the Share List ▶ Modify Security ▶ OK.

Tips

You must be the creator or author of a document to grant rights to modify security settings.

Preventing Other Users from Accessing Your Document

- 1 Click the document reference in your Mailbox.
- 2 Click File > Properties.
- 3 Click the **Sharing** tab.



Click Not Shared ▶ OK.

Viewing the History of a Document

You can use the Activity Log to view the activity history for a document. The Activity Log displays the date and time an activity occurred, the name of the user who performed the activity, the type of activity (opened, checked out, deleted, shared, and so forth) and the document version affected by the activity.

You can display the activities associated with the selected version of a document, or you can display the activities associated with all versions of a document. The most recent document activities display at the beginning of the list.

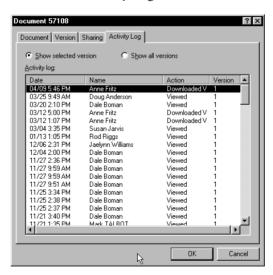
Document activity is also logged when you're using GroupWise Remote; however, you can only view remote activities from the activity log in your Remote Mailbox.

Viewing the Activity Log for Deleted Documents

When you delete a document, GroupWise keeps a copy of the activity log for that document. This makes it possible for you to view the events that took place before the document was deleted. In addition, the system administrator can use this information, specifically the blob filename, to restore specific versions of deleted documents.

Viewing the Activity of a Document

- 1 Click the document reference in your Mailbox.
- 2 Click File > Properties.
- Click the **Activity Log** tab.



Any document activity appears in the list box (check out, check in, delete, and so forth).

Viewing Who Has a Document Open or Checked Out

- 1 Click the document reference in your Mailbox.
- 2 Click File ▶ Properties.
- 3 Click the Activity Log tab to view who has the document open or checked out.

Tips

- You can also view who has a document open on the Version tab. To
 do so, click the document reference > File > Properties > Version.
- To view document activity, you must have View rights for the selected document version.

Checking Out Documents

Use Check Out when you want to lock the documents you are working on for extended periods of time. For example, you can use Check Out to lock documents you want to work on when you are at home or away from the office.

When a document is checked out, it is locked in the library and other users can't modify it; however, they can view it if they have View rights. GroupWise copies the document to the check-out location you specify. The document remains locked in the library until you check it back in.

IMPORTANT: You don't need to use Check Out to lock a file every time you edit it. When you open a document, GroupWise marks the document as In Use, and it can't be edited by other users until you close it.

You can select one or more documents to check out in the Main Window, and you can specify a different filename for each document you check out. In addition, you can specify a default check out location in the File Location tab in Environment options.

Checking Out a Document

1 In your Mailbox, click the document reference for the document you want to check out.

Click Actions ➤ Check Out.



Click Report Filename Conflicts if you to be warned when another file in the checkout location has the same filename.

- In the Checked Out Filename box, type a filename for the document. By default, GroupWise inserts the document number as the check-out
 - filename. If you don't specify a different filename, make a note of the numbered filename so you can locate your checked-out document.
- In the Checked Out Location box, type the path to the location where you want to store the checked-out document.
- Click Check-Out.

Tips

- Users can view the checked-out document in the library if they have View rights.
- Changes you make to the checked-out document do not appear in the document in the library until you check the document back in or update it.
- Other users who have Edit rights cannot edit the document while it is checked out.
- Select Report Filename Conflicts if you want GroupWise to warn you if another file in the check-out location has the same filename.

Checking Out Multiple Documents

- In your Mailbox, Ctrl+click the document references for the documents you want to check out.
- Click Actions > Check Out.
- In the Selected Documents list box, click a document reference.

- In the Checked Out Filename box, specify a check-out filename.
 - By default, GroupWise inserts the document number, version, and extension as the check-out filename. If you don't specify a different filename, make a note of the filename so you can locate your checked-out document.
- Repeat Steps 3 and 4 until you have specified check-out filenames for each document.
- In the Selected Documents list box, Ctrl+click all the documents you want to check out.
- Click Check Out.

Tips

- While the document is checked out, users who have View rights can look at the copy of the document in the library.
- Select Report Filename Conflicts if you want GroupWise to warn you if another file in the check-out location has the same filename.

Viewing All the **Documents You Have Checked Out**

- 1 Click Actions > Check In.
- Click Show All Checked-Out Documents in Selected Library.



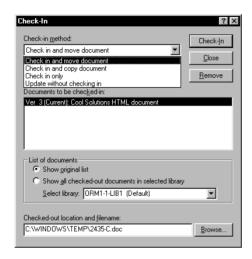
Tips

You can select a different library in the Select Library drop-down list to see the documents you have checked out in that library.

Updating a Checked-**Out Document Without** Checking It In

You can have GroupWise update a document in the library with any changes you have made to the checked-out document without checking in the document. Use Update Without Check In if you are still in the process of editing a document but want to allow other users to view the changes you have made.

- In your Mailbox, click the document reference for the document you want to update in the library.
- Click Actions > Check In.



- Click the Check In Method drop-down list > click Update without Checking In.
- Click Update.

Tips

To update multiple documents, Ctrl+click the document references in your Mailbox.

Checking In Documents

Use Check In to check in documents you have checked out. When you check in a document, the document is unlocked in the library and other users can modify it.

You can check in individual documents, or you can check in multiple documents. The documents you check in can be in any location.

If one or more checked-out documents are selected when you click Check In, GroupWise displays the selected documents in the Documents to be Checked In list box. If no checked-out documents are selected, GroupWise displays a warning and then displays all the documents you have checked out in the list. There are four check-in methods.

	Check-In Method	What It Does
	Check In and Move	Moves the document to the library and deletes it from the check-out location.
	Check In and Copy	Copies the document back to the library and leaves a copy in the check-out location.
	Check In Only	Checks in the document but does not update the document in the library with any changes you made to the checked-out version.
	Update Without Checking In	Updates the document in the library with any changes you have made, but does not unlock the document.
771		10 11 1

When you check in a document, you can specify which version you want the document checked in as. There are three possible versions:

Checked-Out version — Obdates the version of the document that you at	Checked-Out Version	Updates the	version of the	document that you ar
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checking in.

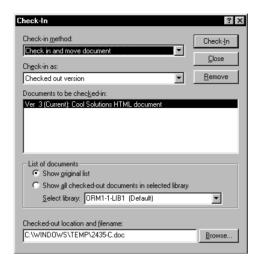
New Version Creates a new version of the document. New Document Creates a document and lets you specify new

document properties for it.

Checking in a **Document and Leaving** a Copy in the Check-**Out Location**

Click the document reference in your Mailbox.

Click Actions ► Check In.



- Click the Check In Method drop-down list click Check In and Copy Document.
- Click the **Check In As** drop-down list ▶ click a version.
- In the Checked Out Location and Filename box, specify the path and filename of the document you are checking in.
- Click Check-In.

Tips

- To check in multiple documents, Ctrl+click while you click the documents in the Documents to Be Checked In list box.
- To remove a document from the Documents to Be Checked In list, click the document > click Remove.

Checking in an **Unchanged Document**

- Click the document reference in your Mailbox. 1
- 2 Click Actions > Check In.
- 3 Click the Check In Method drop-down list.
- Click Check In Only.

5 Click Check In.

Tips

- GroupWise checks in the document without saving changes made while the document was checked out.
- To check in multiple documents, Ctrl+click while selecting the documents in the Documents to Be Checked In list box.

Checking in a Document and Deleting It from the Check-Out Location

- 1 Click the document reference in your Mailbox for the document you want to check in.
- 2 Click Actions ➤ Check In.
- 3 Click the Check In Method drop-down list ▶ click Check In and Move Document.
- **4** Click the **Check In As** drop-down list ▶ click a version.
- **5** In the Checked Out Location and Filename box, specify the path and filename of the document you are checking in.
- 6 Click Check In.

Tips

- To check in multiple documents, Ctrl+click while you select the document references in your Mailbox.
- To remove a document from the Documents to Be Checked In list, click the document click Remove.

Checking In a Document and Making It a New Version

- In your Mailbox, click the document reference you want to check in and make a new version.
- 2 Click Actions ► Check In.
- **3** Click the **Check In Method** drop-down list ▶ click a check-in method.
- **4** Click the Check In As drop-down list ▶ click New Version.
- **5** In the Checked Out Location and Filename box, specify the path and filename of the file you are checking in.

Click Check In.

Tips

To remove a document from the Documents to Be Checked In list, click the document > click Remove.

Deleting Documents

When you delete a document from one of your folders, you can specify whether you want to remove the document reference from the folder, the selected version of the document, or all versions of the document. You can delete any document reference in your Mailbox or folders; however, to delete a selected version or all versions of a document, you must have Delete rights. See Sharing Documents under Creating and Working with Documents for more information about document rights.

When you delete the document from the folder, the reference is removed from the folder, but the document remains in the library. When you delete the document version, the selected version of the document is removed from the library and the document reference is removed from the folder. When you delete all versions of the document in the library, all versions of the document are removed from the library and the reference is removed from the folder.

When you drag a document reference to the Trash folder, the document reference is deleted, but the document in the library is not deleted.

Deleting Documents According to Document Type

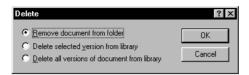
You can delete documents in your folders, or you can let GroupWise automatically delete documents which have exceeded their defined document life. GroupWise removes documents based on the document type assigned to the document on the Document tab in Properties. Each document type has an expiration date and a expiration action associated with it. The system administrator defines the expiration date and action (delete, archive, or retain) when he or she creates the library.

Deleting Groups of Documents

You can delete a group of documents using the Mass Document Operations wizard. To delete a group of documents, you must have Delete rights to each document, or you must have Manage rights and be a librarian for the library. For more information see Managing Groups of Documents under Creating and Working with Documents.

Deleting a Document from Your Mailbox

- 1 Click the document reference in your Mailbox.
- 2 Click Edit ➤ Delete.



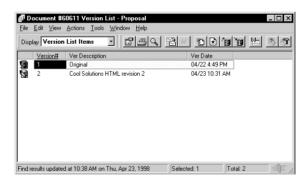
3 Click Remove Document from Folder ➤ OK.

Tips

• The document in the library is not deleted, and any users with references to the document can still view, open, edit, or delete it, depending on their rights.

Deleting a Specific Version of a Document

- 1 Click the document reference in your Mailbox.
- 2 Click Actions ➤ Version List.

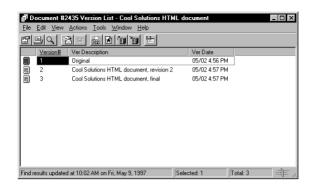


- **3** Click the version you want to delete.
- 4 Click Edit ➤ Delete.

Deleting All Versions of a Document

1 Click the document reference in your Mailbox.

Click Edit ▶ Delete.



Click Delete All Versions of Document from Library ▶ click OK.

Tips

You can click Remove Document from Folder to remove a document reference without deleting the corresponding document.

Copying Documents

You can copy documents and their properties to create similar documents. Copying a document creates a new document in the library.

When you copy a document you can specify how you want to create document properties for the new document. You can specify properties manually for the document, or you can have GroupWise create properties for you using the values in the original document.

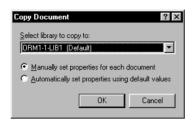
Copying Groups of Documents

You can copy groups of documents using the Mass Document Operations wizard. To copy a group of documents you must have View rights to each document, or you must have Manage rights and be a librarian for the library. For more information see Copying Groups of Documents under Managing Groups of Documents.

Copying a Document

Click a document reference in your Mailbox.

2 Click Actions ► Copy Document.



- 3 Select the method you want to use to create a property sheet for the document.
- 4 Click OK.

Copying a Document to Another Library

- 1 Click the document reference in your Mailbox.
- 2 Click Actions ► Copy Document.
- 3 Select the library to which you want to copy the document in the Select Library to Copy To drop-down list.
- 4 Select which method you want to use for creating document properties ► click OK.

Tips

• The information in the system fields (Document Type, Author, and Document Subject) is copied with the document to the new library.

Saving Documents

You can use Save As to save documents outside of GroupWise Library. Save As lets you create a copy of a document outside of the library; however, when you use Save As, any changes you make to the saved document are not updated in the library.

Saving Items as Documents

You can save any of the items in your Mailbox as a document in the library. Items are saved in WordPerfect 5.1 format. For more information see *Saving Items in Your Mailbox* under *Managing Your Mailbox*.

Saving Changes to a **Document's Contents**

To save changes you have made to the contents of a document, use the Save feature in the corresponding application.

The Save feature in your application functions differently depending on whether you are using an integrated or a non-integrated application.

Saving Documents in Non-Integrated Applications

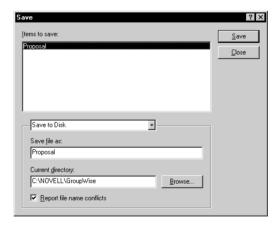
If you are using non-integrated applications (all Windows 3.1 applications and many Windows 95 applications), you can't save the document as a new version from the application. To create a new version of the a document, you must create the new version before you open the document. To make sure your changes are saved in the library, don't rename the document when you save it from within the application.

Saving Documents in Integrated Applications

If you are using an integrated application (such as WordPerfect 7 or Word 7), GroupWise can integrate the document management features with the application's Save As feature. When you select Save As in the application, you have the option of saving the document as a new version in GroupWise Library. In addition, you can select the GroupWise folder you want to save the document in.

Saving Documents Outside of the **GroupWise Library**

- 1 Click the document reference in your Mailbox.
- 2 Click File ► Save As.



- In the Save File As box, specify a name for the document.
- Click **Browse** specify the path to the location where you want the document saved > click OK.

Tips

If you need to share documents with users who do not have access to GroupWise, you can attach the document reference to a mail message and send it to them, or you can use Save As to make a copy of the document outside of the library.

Opening Documents

When you double-click a document reference in your Mailbox or folder, GroupWise opens the document in the associated application. You can then edit the document. If you only have rights to view the document, you can open the document two ways: you can open the document as a read-only file in the application, or you can open the document in the GroupWise viewer.

GroupWise sets the status of the selected version as In Use while you have it open. This status locks the selected document version and prevents other users from editing it while you have it open. When you exit the document, the In Use status is removed and the version is unlocked.

If you want to lock a version of a document for multiple editing sessions, use Check Out. Check Out lets you copy the selected version of a document to another location, and it remains locked until you check it in.

Opening Read-Only Documents

If you don't have Edit rights to a document, you can open a read-only copy of the document in an application. This makes it possible for you to see graphics and layout elements which may not display correctly in the GroupWise viewer.

If you have Edit rights to a document, read-only documents are also a useful way to view a document if it is marked In Use or if it is checked out.

You can only open one read-only document at a time in each application.

Opening Documents in Non-Integrated Applications

If you are using non-integrated applications (most Windows 3.1 applications, MS DOS applications, and many Windows 95 applications), GroupWise copies the document back to the library when you close the application, not when you close the document.

Opening Documents in Integrated Applications

If you are using an integrated application (such as WordPerfect 7 or Word 7), GroupWise can integrate the document management features with the application's Open and Save As feature.

When you select **Open** in the application, a dialog displays all the available document references in your Mailbox. You can select a document reference to open the document, or you can click the Select Document Using Application Dialog button to use the application's regular Open dialog box.

Opening Documents in GroupWise Remote

If you are using GroupWise Remote, you must manually mark the document version as In Use when you retrieve it from your Master Mailbox. When you exit the document, Remote prompts you to clear the In Use status.

Opening Documents

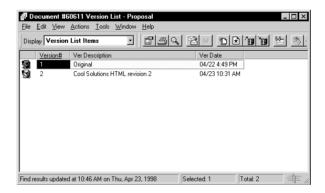
Double-click the document reference in your Mailbox.

Tips

If you do not have access to the application the document was created in, GroupWise prompts you to specify an application. You may be able to open the document in a related application.

Opening Multiple Versions of a **Document**

- 1 Click the document reference in your Mailbox.
- Click Actions > Version List.



- Select the versions you want to open in the Version list box.
- Click **Actions** ▶ **Open**.

Storing Multiple Versions of a Document

You can store multiple versions of a document in GroupWise. Each document reference in your Mailbox points to a single document version. You can view information about a specific version of a document on the Version tab in Properties. You can manage (open, check out, check in, and so forth) document versions in the Version List dialog box. There are three categories of document versions in GroupWise:

Current Version

The most recent revision of the document.

Official Version

The version you designate as official. When you designate an official version, you can grant users different access rights to the official version than you grant them to all other versions of the document. For example, you can grant all users rights to view the official version of the employee handbook, but grant only yourself rights to view and edit all other versions of the handbook. If you do not specify an official version of the document, the current version is considered to be the official version. In the Item List, a star displays next to the document reference for the official version.

Specific Version

A version of a document that is referenced directly by its version number. In the Item List, the number symbol (#) displays next to the document reference. You can grant different access rights for each version of the document. For example, you can grant all users on your system View rights to the official version and grant specific users View rights to the current version.

Creating a New Version of a Document

- 1 In your Mailbox, click the document reference for the document you want to create a new version of.
- 2 Click File ➤ New ➤ Document Version.



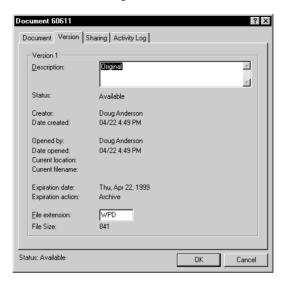
3 Type a description for this version of the document ► click **OK**.

Tips

The selected version and its properties are copied to a new version.

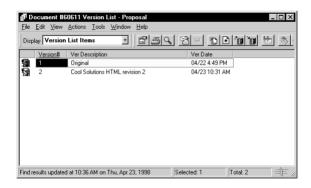
Viewing Version Information for a Document

- 1 Click the document reference in your Mailbox.
- 2 Click File ▶ Properties ▶ the Version tab.



Specifying the Official Version of a Document

- 1 Click the document reference in your Mailbox.
- 2 Click Actions ► Version List.



- **3** Click the version you want to mark official.
- 4 Click Actions ► Mark Official Version.

Tips

 To set the official version, you must have rights to modify security settings and the system administrator must have given you rights to set the official version of a document.

Managing Groups of Documents

Whether you're a user responsible for twenty documents or a system administrator responsible for thousands of documents, you can use the Mass Document Operations wizard to efficiently manage groups of documents. Using the wizard, you can perform all of the following tasks:

- Move a group of documents to another library.
- Share a group of documents with another user.
- Copy a group of documents.
- Delete a group of documents.
- Assign a group of documents to a new author.
- Modify the properties (subject, document type, and so on) of a group of documents.

Preparing for a Mass Operation

Before you can perform a mass operation on a group of documents you must have sufficient rights to the documents. If you have Manage rights, you're called a librarian, and you can perform the mass document operations on all the documents in the library. If you're not a librarian, you can only perform mass document operations on the documents to which you have rights. The following table shows which rights you must have to perform each operation:

Document Operation	Required Rights
Move	Requires View and Delete rights to the document, or you must be a librarian for the library. In addition, you must have Add rights to the destination library.
Сору	Requires View rights to the document, or you must be a librarian for the library. In addition, you must have Add rights to the destination library.
Delete	Requires Delete rights to the document, or you must be a librarian for the library. In addition, you must have Delete rights to the library.
Share	Requires Modify Security rights to the document, or you must be a librarian for the library. In addition, you must have Change rights to the library.
Assign documents to a new author	Requires Edit and Modify Security rights to the document, or you must be a librarian for the library.

Modify document properties

You must have Edit rights, or be a librarian for the library. In addition, you must have Change rights to the library.

Selecting Documents for the Mass Operation

Before you begin the mass operation, you must specify which documents you want to include. There are three methods you can use to select documents: You can select the documents from a dialog box in the Mass Document Operations wizard. You can select the documents in a folder or your Mailbox before you open the Mass Document Operations wizard. Or, you can specify the name of a file on disk that contains a list of document IDs.

Previewing the Results of a Move

When you use Find in the Mass Document Operations wizard to specify which documents you want to move, copy, delete, or change, you can click the Preview button (on the last dialog box in the wizard) to see a sample of the documents that will be moved, copied, deleted, or changed based on the criteria you specified in Find. This makes it possible for you to review these results and verify that the criteria are accurate and select the correct documents. If not, you can return to the wizard and modify the Find criteria to expand or limit the documents included in the operation.

Using Mass Document Operations in Remote

The Mass Document Operations wizard is not available in your Remote Mailbox. You can perform the same tasks on individual documents while you're in your Remote Mailbox, but not with groups of documents.

Acting as the Librarian User

The system administrator can give users Manage rights to a library. When you have Manage rights, you are called a librarian, and you can perform mass document operations, such as changing document properties, moving documents, and so on, on all the documents in the library.

The librarian can see and modify all the properties of a document, such as author, creator, security, subject, document type, and so on, but the librarian can't see the content of the document. (To see the content of a document, the librarian must have View rights for that version of the document.) If the librarian makes any changes to the author or sharing rights of a document, the original author of the document receives a mail message that notifies him or her of the change. This prevents the librarian from giving unauthorized users access to a document.

In addition to modifying the properties listed above, the librarian can also perform the following actions on all the documents in the library:

- Delete a group of documents from the library.
- Move or copy documents to a different library.
- Change the document properties (author, document type, subject, an so on) of a group of documents in the library.
- Change the sharing rights to a group of documents in the library.

- Reset a document's status.
- Use the GroupWise 3rd-party APIs to generate reports on all the documents in the library.

Librarian and GroupWise Remote

The librarian can see all the properties of a document from his or her Remote Mailbox; however, the librarian can't change the author or sharing rights of a document while he or she is using a Remote Mailbox.

Librarian and Older Versions of GroupWise

If a librarian accesses a library using an older version of the GroupWise Client, such as GroupWise 5.1 or 5.2, he or she will not have librarian access to documents, because neither the Manage right nor the librarian user existed in earlier releases of GroupWise.

Copying a Group of Documents

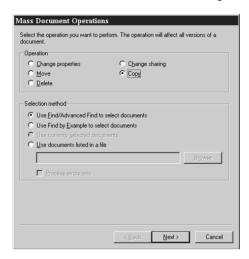
You can copy groups of documents using the Mass Document Operations wizard. To copy a group of documents you must have View rights to each document, or you must be a librarian for the library. In addition, you must have Add rights in the library to which you want to copy the documents.

When you copy a group of documents, all versions of the document are copied. In the destination library, each copy of the document receives a new document number, but the document retains the same version number that it had in the source library. For example, if document #458 had a version one, two, and five in the Marketing library and you copy it to the Sales library, it would become document #459 (or whatever the next number is) in the Sales library, but it would still have a version one, two, and five. GroupWise copies all the document properties, including document activity and custom fields, to the destination library and stores them with the document; however, the custom fields will not display in Document Properties if the destination library doesn't contain the field. When you copy documents, document references are not updated.

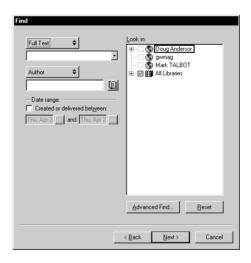
Copying One Document • If you want to copy one document, click Copy Document from the Actions menu.

Coping a Group of Documents

Click Tools ► Mass Document Operations.



- In the Operation group box, click **Copy**.
- In the Selection Method group box, click Use Find/Advanced Find to Select Documents ► Next.



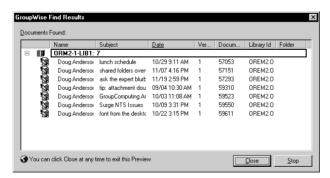
Make sure Full Text is displayed on the first drop-down list to search both the document properties and the document content, then type the text you want to find.

Click the Full Text drop-down list ▶ click Subject to search just the document subject, then type the text you want to find.

- 5 Make sure Author is selected, then specify the name or names of the author of the documents you want to find.
- **6** If you want to search for documents that were created or received between specific dates, select the **Created or Delivered Between** check box, then specify a beginning and an ending date.
- 7 In the Look In list box, select the libraries you want to search.
- 8 Click Next.
- **9** In the Select Library To Copy Documents To list box, select the destination library ► Next.



10 Click **Preview** to see a sample of the documents that will be copied based on the Find criteria you specified.



You can click **Close** at any time in the Find Results dialog box to cancel the Preview.

11 Specify the directory where you want to save the log file.

You can click Generate a Log File without Performing the Move Operation to see the outcome of the move without actually copying the documents.

12 Click Finish to begin copying documents.

Copying a Group of Selected Documents

- Select the documents you want to copy in your Mailbox or folders.
- Click Tools > Mass Document Operations.
- In the Operation group box, click Copy.
- In the Selection Method group box, click Use Currently Selected Documents ► Next
- In the Select Library To Copy Documents To list box, click the destination library ► Next.
- Specify the directory where you want to save the log file.
- You can click Generate a Log File without Performing the Copy Operation to see the outcome of the copy without actually copying the documents.
- Click Finish to begin copying documents.

Copying a Group of Documents Listed in a File

- Click Tools ► Mass Document Operations.
- In the Operation group box, click **Copy**.
- In the Selection Method group box, click Use Documents Listed in a File.
- Specify the name of the file that contains a list of documents you want to copy ► click Next.
- If the file you specify is a log file from a previous copy operation, you can click Process Errors Only and GroupWise only processes the documents that generated errors during the previous session.
- In the Select Library To Copy Documents To list box, click the destination library ► Next.
- Specify the directory where you want to save the log file.
- You can click Generate a Log File without Performing the Copy Operation to see the outcome of the copy without actually copying the documents.

Click Finish to begin copying documents.

Tips

- You can specify any text file (ASCII or ANSI) as the source file for a copy operation as long as the file contains a list of document IDs. If you're creating a file, make sure that each document ID is at the beginning of a line and that there is only one document per line.
- You can also specify the error file from a previous copy operation as the source file.

Moving a Group of **Documents**

You can move a group of documents to another library using the Mass Document Operations wizard. To move a group of documents, you must have View and Delete rights for each document you want to move, or you must be a librarian for the selected library. In addition, you must have Add rights for the destination library.

The documents you select for the move operation can be stored in multiple libraries on different post offices. GroupWise moves all versions of the selected documents and all document properties, including document activity and custom fields. If the destination library doesn't contain one or more custom fields that exist in the source library, GroupWise moves the value for the custom field and stores it with the document in the new library; however, the value will not display in Document Properties until the system administrator adds that custom field to the destination library.

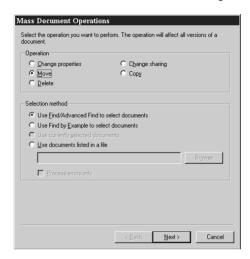
Notifying Authors and Users of Moved Documents

When the move is complete, GroupWise sends a message to you which contains a list of all the moved documents. In addition, GroupWise sends a message to the author of each moved document which shows the document's new location. If a user is the author of multiple moved documents, the message contains a list of all his or her moved documents and the new location of the documents. Other users, who are not authors of the document, are not notified that the document was moved.

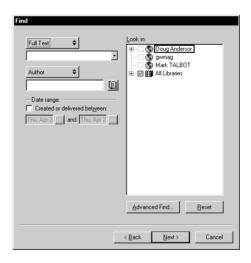
GroupWise automatically updates any document references to moved documents at the end of the move process. However, if a document reference is attached to a mail message, GroupWise does not update the reference. Instead, when a user clicks the attached document reference, a message displays that explains the document was moved and gives the new location of the document.

Moving a Group of Documents

Click Tools ► Mass Document Operations.



- In the Operation group box, click Move.
- In the Selection Method group box, click Use Find/Advanced Find to Select Documents ► Next.

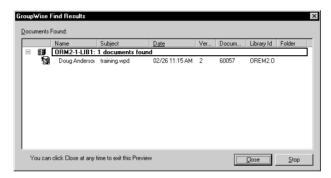


If you want to search both the document properties and the document content, make sure that Full Text appears on the drop-down list, then type the text you want to find.

or

If you want to search just the document subject, click the Full Text dropdown list • Subject, then type the text you want to find.

- Make sure **Author** is selected, then specify the name or names of the author of the documents you want to find.
- If you want to search for documents that were created or sent between specific dates, select the Created or Delivered Between check box, then specify a beginning and an ending date.
- In the Look In list box, click the libraries you want to search ▶ click Next.
- In the Select Library To Move Documents To list box, click the destination library ► Next.
- Click **Preview** to see a sample of the documents that will be moved based on the Find criteria you specified.



You can click Close at any time in the Find Results dialog box to cancel the preview.

- **10** Specify the directory where you want to save the log file.
- 11 You can click Generate a Log File without Performing the Operation to see the outcome of the move without actually moving the documents.
- **12** Click Finish to begin moving documents.

Moving a Group of Selected Documents

- 1 Select the documents you want to move in your Mailbox or folder.
- 2 Click Tools ► Mass Document Operations.
- 3 In the Operation group box, click Move.
- In the Selection Method group box, click Use Currently Selected Documents ► Next.
- In the Select Library To Move Documents To list box, click the destination library ► click Next.
- Specify the directory where you want to save the log file.
- You can click Generate a Log File without Performing the Move Operation to see the outcome of the move without actually moving the documents.

Click Finish to begin moving documents.

Moving a Group Documents in a File

- Click Tools Mass Document Operations.
- In the Operation group box, click **Move**.
- In the Selection Method group box, click Use Documents Listed in a File.
- Specify the name of the file that contains the list of documents you want to move > click Next.
 - If the file you specify is a log file from a previous move operation, you can click Process Errors Only and GroupWise will only process the documents that generated errors during the previous session.
- In the Select Library To Move Documents To list box, click the destination library ▶ click Next.
- Specify the directory where you want to save the log file.
- You can click Generate a Log File without Performing the Move Operation to see the outcome of the delete without actually moving the documents.
- Click **Finish** to begin moving documents.

Tips

- You can specify any text file (ASCII or ANSI) as the source file for a move operation as long as the file contains a list of document IDs. If you're creating a file, make sure that each document ID is at the beginning of a line and that there is only one document per each
- You can also specify the error file from a previous move operation as the source file.

Changing the **Properties of a Group** of Documents

As you manage your GroupWise documents, you often need to change the properties of several documents at the same time. For example, if an employee leaves the company, you may need to reassign all of his or her documents to another person, or if a new employee joins the company, you may need to give him or her access to several documents. You can use the Change Properties in the Mass Document Operations wizard to efficiently perform these types of tasks (reassigning documents, changing document types, and so on) for groups of documents.

You can change the subject, author, or document type for a group of documents. In addition, you can change the value of any custom fields defined in the library. The fields you can modify vary depending on the location of the documents you select for the mass change operation. If the documents you select are all stored in the same library, you can make changes to both system fields (subject, author,

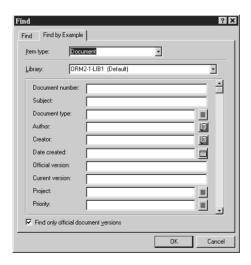
and document type) and custom fields. If the documents you select are stored in different libraries, you can only modify system fields. GroupWise imposes this restriction because the libraries you select may not contain the same custom fields.

Changing the Properties of a Group of Documents

1 Click Tools ► Mass Document Operations.

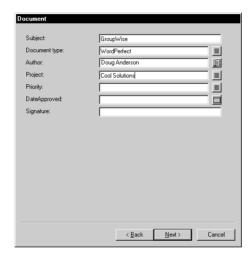


- 2 In the Operation group box, click Change Properties.
- 3 In the Selection Method group box, click Use Find/Advanced Find to Select Documents Next.



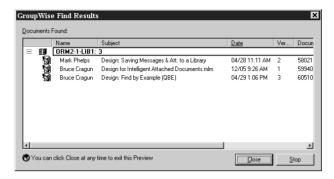
Make sure Full Text appears on the first drop-down list to search both the document properties and the document content, then type the text you want to find.

- Click the Full Text drop-down list ▶ Subject to search just the document subject, then type the text you want to find.
- Make sure Author is selected, then specify the name or names of the author of the documents you want to find.
- If you want to search for documents that were created or sent between specific dates, select the Created or Delivered Between check box, then specify a beginning and an ending date.
- Click Next.



Specify new values for any of the document properties ► click Next.

9 Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.



You can click **Close** at any time in the Find Results dialog box to cancel the preview.

10 Specify the directory where you want to save the log file.

You can click **Generate a Log File without Performing the Operation** to see the outcome of the operation without actually changing the documents.

11 Click Finish to begin.

Changing the Properties for Selected Documents

- Select the documents for which you want to modify properties in your Mailbox or folder.
- 2 Click Tools ► Mass Document Operations.
- **3** In the Operation group box, click **Change Properties**.
- 4 In the Selection Method group box, click Use Currently Selected Documents Next.
- **5** Specify new values for any of the document property fields ▶ click **Next**.
- 6 Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.
 - You can click **Close** at any time in the Find Results dialog box to cancel the preview.
- **7** Specify the directory where you want to save the log file.
 - You can click **Generate a Log File without Performing the Operation** to see the outcome of the operation without actually modifying the documents.
- 8 Click Finish to begin.

Changing the Properties for a Group of Documents in a File

- Click Tools Mass Document Operations.
- In the Operation group box, click Change Properties.
- In the Selection Method group box, click Use Documents Listed in a File.
- Specify the name of the file that contains the list of documents for which you want to change properties ▶ click Next.
 - If the file you specify is a log file from a previous session, you can click Process Errors Only and GroupWise only processes the documents that generated errors during that session.
- Specify new values for any of the document properties fields > click Next.
- Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.
 - You can click Close at any time in the Find Results dialog box to cancel the preview.
- Specify the directory where you want to save the log file.
 - You can click Generate a Log File without Performing the Operation to see the outcome of the operation without actually modifying the documents.
- Click Finish to begin.

Tips

- You can specify any text file (ASCII or ANSI) as the source file for a change properties operation as long as the file contains a list of document IDs. If you're creating a file, make sure that each document ID is at the beginning of a line and that there is only one document ID on each line.
- You can also specify the error file from a previous change properties operation as the source file.

Changing Sharing for a Group of Documents

You can give, modify, or remove a user's access to a group of documents. You can do this two ways: you can modify a user's rights in the existing Share List for the group of documents, or you can create a new Share List which will replace the existing Share List for each document in the group.

Modify the Existing Share List

If you select Add New Users and Rights to the Selected Documents, you can add, remove, or change a user's rights to the group of documents without changing any of the rights you've given to other users. For example, you could grant a new employee rights to all the benefit documents in the library. This adds the new employee to the Share List for each document in the group, but it doesn't modify the rights of any of the other employees.

If the user you want to add already has rights to one or more of the documents in the group, the rights you specify in the wizard will replace any previous rights this user had to the documents, but it will not reduce rights the user already has. For example, suppose you give Pam View rights for a group of documents which includes Document A, but Pam already has both View and Edit rights to Document A. In this case, GroupWise will give Pam View rights to all the documents in the group, including Document A, but GroupWise will not remove Pam's Edit rights to Document A.

Replacing an Existing Share List with a New Share List

If you select Replace Share List for Selected Documents, you can create a new Share List for each of the selected documents. This new Share List replaces the existing Share List, and only the users on the new Share List have rights to the selected documents.

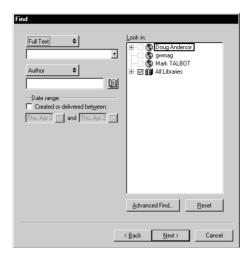
Changing the Sharing Rights for a Group of Documents

Click Tools • Mass Document Operations.



In the Operation group box, click Change Sharing.

In the Selection Method group box, click Use Find/Advanced Find to Select Documents • Next.



Make sure that Full Text appears on the first drop-down list if you want to search both the document properties and the document content, then type the text you want to find.

Click the **Full Text** drop-down list ▶ click **Subject** to search just the document subject, then type the text you want to find.

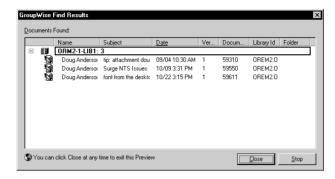
- Make sure Author is selected, then specify the name or names of the author of the documents you want to find.
- If you want to search only for documents that were created or received between specific dates, select the Created or Delivered Between check box, then specify a beginning and an ending date.

In the Look In list box, click the libraries you want to search ▶ click Next.



- Click Add New Users and Rights to Selected Documents to modify the existing Share Lists for each document in the group.
 - Click Replace Share Lists for Selected Documents to create a new Share List that will replace the existing Share List for each document in the group.
- In the Name box, type the name of the user for which you want to modify sharing ► click Add User
- **10** In the Share List, click the name of the user for whom you want to modify sharing rights.
- 11 In the Rights for All Versions group box, click the rights you want to give the user to the selected group of documents.
- 12 If you want to specify sharing rights for specific versions, click Version Level **Security**, specify the rights for each version ► click **OK**.
- 13 Click Next.

14 Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.



You can click Close at any time in the Find Results dialog box to cancel the preview.

- **15** Specify the directory where you want to save the log file. You can click Generate a Log File without Performing the Operation to see the outcome of the operation without actually modifying the documents.
- **16** Click Finish to begin modifying the document sharing.

Changing Sharing Rights for Selected Documents

- Select the documents in your Mailbox and folders for which you want to change sharing rights.
- Click Tools ► Mass Document Operations.
- In the Operation group box, click Change Sharing.
- In the Selection Method group box, click Use Currently Selected Documents ► Next.
- To modify the existing Share Lists for each document in the group, click Add New Users and Rights to Selected Documents.

- To create a new Share List that will replace the existing Share List for each document in the group, click Replace Share Lists for Selected Documents.
- In the Name box, type the name of the user for whom you want to modify sharing rights ► click Add User.
- In the Share List, click the name of the user for whom you want to modify sharing rights.
- In the Rights for All Versions group box, click the rights you want to give the user to the selected group of documents.
- If you want to specify sharing rights for specific versions, click Version Level Security, specify the rights for each version ▶ click OK.

- 10 Click Next.
- 11 Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.
 - You can click **Close** at any time in the Find Results dialog box to cancel the preview.
- **12** Specify the directory where you want to save the log file.
 - You can click Generate a Log File without Performing the Operation to see the outcome of the operation without actually modifying the documents.
- **13** Click Finish to begin.

Changing Sharing Rights for Documents in a File

- 1 Click Tools ► Mass Document Operations.
- 2 In the Operation group box, click Change Sharing.
- 3 In the Selection Method group box, click Use Documents Listed in a File.
- Specify the name of the file that contains a list of the documents for which you want to change sharing rights ▶ click Next.
 - If the file you specify is a log file from a previous operation, you can click Process Errors Only and GroupWise only processes the documents that generated errors during the previous session.
- Click Add New Users and Rights to Selected Documents to modify the existing Share Lists for each document in the group. or
 - Click Replace Share Lists for Selected Documents to create a new Share List that will replace the existing Share List for each document in the group.
- In the Name box, type the name of the user for whom you want to modify sharing rights ► click Add User.
- In the Share List, click the name of the user for whom you want to modify sharing rights.
- In the Rights for All Versions group box, click the rights you want to give the user to the selected group of documents.
- If you want to specify sharing rights for specific versions, click Version Level Security, specify the rights for each version ▶ click OK.
- 10 Click Next.
- 11 Click Preview to see a sample of the documents that will be modified based on the Find criteria you specified.
 - You can click Close at any time in the Find Results dialog box to cancel the preview.
- **12** Specify the directory where you want to save the log file.

You can click Generate a Log File without Performing the Operation to see the outcome of the operation without actually modifying the documents.

13 Click Finish to begin.

Deleting a Group of Documents

You can delete a group of documents using the Mass Document Operations wizard. To delete a group of documents you must have Delete rights to the documents, or you must be a librarian for the library. In addition, you must have Delete rights to the library from which you want to remove the documents.

When you delete a group of documents, all versions of the documents are deleted; however, the activity logs for the deleted documents are not removed. Document references that point to deleted documents are not deleted. If you click a document reference to a deleted document, a message appears telling you that the document has been deleted.

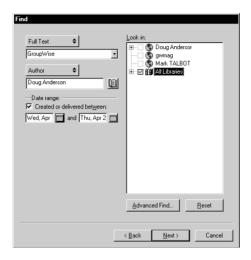
Deleting a Group of Documents

Click Tools ► Mass Document Operations.



In the Operation group box, click **Delete**.

In the Selection Method group box, click Use Find/Advanced Find to Select Documents • Next.

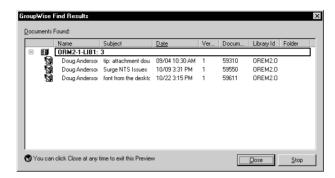


If you want to search both the document properties and the document content, make sure that Full Text appears on the drop-down list, then type the text you want to find.

If you want to search just the document subject, click the Full Text dropdown list **Subject**, then type the text you want to find.

- Make sure **Author** is selected, then specify the name or names of the author of the documents you want to find.
- If you want to search for documents that were created or sent between specific dates, select the Created or Delivered Between check box, then specify a beginning and an ending date.
- In the Look In list box, click the libraries you want to search ▶ click Next.

Click Preview to see a sample of the documents that will be deleted based on the Find criteria you specified.



- You can click **Close** at any time in the Find Results dialog box to cancel the preview.
- **10** Specify the directory where you want to save the log file.
- 11 You can click Generate a Log File without Performing the Delete **Operation** to see the outcome of the delete without actually deleting the documents.
- **12** Click Finish to begin deleting documents.

Tips

You must have Delete rights to all of the documents and Delete rights in the library to delete a group of documents, or you must have Manage rights and be a librarian for library.

Deleting a Group of Selected Documents

- In your Mailbox or folders, click the document references for the documents you want to delete.
- Click Tools ► Mass Document Operations.
- In the Operation group box, click **Delete**
- In the Selection Method group box, click Use Currently Selected Documents ► Next.
- Specify the directory where you want to save the log file.
- You can click Generate a Log File without Performing the Delete **Operation** to see the outcome of the delete without actually deleting the documents.
- Click Finish to begin deleting documents.

Deleting a Group of Documents Listed in a File

- 1 Click Tools ► Mass Document Operations.
- **2** In the Operation group box, click **Delete**.
- **3** In the Selection Method group box, click Use Documents Listed in a File.
- 4 Specify the name of the file that contains the list of documents you want to delete > click Next.
- 5 If the file you specify is a log file from a previous delete operation, you can click **Process Errors Only** and GroupWise will only process the documents that generated errors during the previous session.
- **6** Specify the directory where you want to save the log file.
- 7 You can click Generate a Log File without Performing the Delete Operation to see the outcome of the delete without actually deleting the documents.
- **8** Click Finish to begin deleting documents.

Tips

 You must have Delete rights to all of the documents and Delete rights in the library to delete a group of documents, or you must have Manage rights and be a librarian for library.

Viewing Documents When Your Network or GroupWise Is Unavailable

After you have edited and closed a document or documents in your Master Mailbox, you can have a copy of every document you edited placed in your Remote Library. This is called document echoing. Then when your network, GroupWise Library, or GroupWise post office is unavailable, you can open and modify your latest edited documents in Remote. Document echoing will also save the time of downloading documents when you are running Remote.

If you have a workstation install of GroupWise, you need to be connected to the network to use document echoing. If you have a standard or custom (local) install of GroupWise, you do not need to be connected to the network.

You must have a Remote Mailbox on your machine for document echoing to occur. Documents are echoed whenever you close or check-in a document in your Master Mailbox. The document reference for the document is added to your Documents folder in your Remote Mailbox, and the document is copied to your Remote Library. You can use Remote Disk Space Management to remove

unneeded documents that take up extra disk space. Document echoing does not occur when you close or check-in documents in your Remote Mailbox.

- Click Tools ▶ Options ▶ double-click Documents.
- Click the General tab.



- Click Echo Documents to GroupWise Remote > click OK.
- If prompted, type your Master Mailbox password.
- If prompted, specify the path where you would like the Remote Mailbox created on this machine > click Next.
- Select the gateway phone numbers you will use to connect to GroupWise when you run Remote ▶ click Finish.
- If you are running GroupWise with a workstation install, you are prompted to install a local copy. If you click Yes, GroupWise exits and setup starts. Follow the prompts for a custom or standard install.
 - Whether you are running GroupWise with a workstation or standard install, documents will be echoed to your Remote Mailbox. However, you need a standard install to access these documents if the network is unavailable.
- Edit documents that you would like copied (echoed) to your Remote Library.
- Run Remote when your GroupWise post office, GroupWise Library, or network is unavailable.

Tips

- If you connect your laptop to the network and turn on document echoing before you edit documents, you will be able to travel with your latest edited documents.
- Documents are echoed whenever you close or check-in a document in your Master Mailbox. The document is copied to your Remote Library, and the document reference for the document is added to your Documents folder in your Remote Mailbox.
- You must have a Remote Mailbox on your machine for document echoing to occur. When you create a Remote Mailbox in step 5, only a basic Remote Mailbox is created. If you want to download specific folders and items to your Remote Mailbox, you can run Hit the Road later.
- Document echoing does not occur when you close or check-in documents in your Remote Mailbox.
- You can use Remote Disk Space Management to remove unneeded documents that take up extra disk space in your Remote Library.

Integrating GroupWise with Your Applications

GroupWise Integrations make it possible for you to link your applications to your GroupWise Mailbox. In an integrated application, you can see the documents in your Mailbox and folders when you select Open in the application. In addition, you can save a document as a new version using the application's Save As feature. Integrating makes it possible for you to create, edit, and save GroupWise documents within your applications.

GroupWise can integrate with applications one of two ways: through the Open Document Management API (ODMA) supplied by the application, or through a point-to-point integration macro.

GroupWise supplies point-to-point integration macros for Word 7, Excel™ 95, and Excel 97; however, anyone can create a point-to-point integration macro. You can also integrate GroupWise with all ODMA enabled applications including: Word 97, PowerPoint®, Binder, Word Pro™, WordPerfect® 7, WordPerfect 8, Corel Presentations™ 7, Corel Presentations 8, Quattro Pro® 7, and Quattro Pro 8. (This list contains the applications that are currently ODMA enabled, and will change as more applications implement ODMA.)

Integrating **Applications During** Setup

If Setup detects that you have an ODMA enabled application, such as WordPerfect, Microsoft Word, or Excel properly installed, Setup prompts you to specify whether you want GroupWise to integrate with the application. If you integrate your applications and later want to disable the integration, you can turn off the integration in the Documents Setup dialog box.

Integrating **Applications After** Setup

If your applications are ODMA enabled or have a point-to-point integration macro, GroupWise prompts you to enable integrations with your applications during Setup; however, if you don't enable the integrations during Setup but later decide you do want to use integrations, you must run Setup again to install them. After you've run Setup, you can turn integrations on or off for each application on the Integrations tab in Documents Setup.

Once you've enabled integrations, you can turn them on or off at any time.

Turning Integrations

You can turn off integrations for one application or for all your applications. When you turn off integrations, your applications work like non-integrated applications, and GroupWise can't monitor when you open and save documents. As a result, your documents are returned to the library when you close the application, not when you close the document.

Turning Off Integrations for All Your Applications

Click Tools ▶ Options ▶ double-click Documents.



- Click the **Integrations** tab.
- Deselect the **Enable Integrations** check box.

Turning Off Integrations for One Application

- Click Tools ▶ Options ▶ double-click Documents.
- 2 Click the **Integrations** tab.
- Make sure the **Enable Integrations** check box is selected.

- In the Registered Applications box, click the application for which you want to turn off integrations.
- Click Disabled ▶ OK.

Tips

When an application is disabled, no text displays to the right of the application name in the Registered Applications list box.

Turning On Integrations

You can turn integration on for one application or for all your eligible applications.

Before you turn on integration, verify that the application is ODMA enabled or is supported by a point-to-point integration macro. The list of applications on the Integrations tab shows all the applications that are registered on your machine. It is not a list of ODMA enabled applications. It is a list of registered applications. If you select an application that is not ODMA enabled and try to turn on integration, GroupWise displays a message warning you that the application is not ODMA enabled. If you proceed and register the non-ODMA application, the integration will not work for that application.

If the application for which you are turning on integrations has two executable files (for example, WordPerfect) you must specify the name of the main executable file (such as WPWIN.EXE for WordPerfect) on the Executable tab in Advanced Integrations. GroupWise launches the executable you specify, and that executable launches the application.

Turning On Integrations for All Your Applications

- Click Tools ▶ Options ▶ double-click Documents.
- 2 Click the **Integrations** tab.
- Select the **Enable Integrations** check box ▶ **OK**.

Tips

This turns on integrations for all your integrated applications. It doesn't have any affect on non-integrated applications.

Turning On Integrations for One Application

- Click Tools ▶ Options ▶ double-click Documents.
- 2 Click the **Integrations** tab.
- Select the **Enable Integrations** check box.

- In the Registered Applications list box, click the application for which you want to turn on integration.
- Click Enabled ▶ OK.

Using Non-Integrated Applications

If you're using non-integrated applications (most Windows 3.1 applications, MS DOS applications, and many Windows 95 applications), you can't integrate GroupWise with your application; however, this does not mean that you can't use GroupWise documents with these applications. It just means that you can't take advantage of the integrated Open and Save features. You can use the options on the Non-Integrated tab in Advanced Integration options to specify whether or not you want GroupWise to display a warning message when GroupWise loses contact with a non-integrated application. This message reminds you that you must manually return the document to the library. You can also specify how many seconds you want GroupWise to wait for non-integrated applications to open.

Turning the Warning Message for Non-Integrated Applications On or Off

GroupWise displays the warning message when it loses contact with the application. The message reminds you to manually return the document to the library.

- Click Tools ▶ Options ▶ double-click Documents.
- Click the Integrations tab ► click Advanced ► click the Non-Integrated tab.

To turn off the warning message, deselect the Display Message check box.

Specifying How Long GroupWise Should Wait for a Non-Integrated Application to Open

GroupWise waits the number of seconds you specify for the non-integrated application to open. If GroupWise doesn't detect the application opening, GroupWise times out and loses contact with the document, which means GroupWise can't return it to the library.

If you have an application that loads very slowly, you can increase the wait interval to prevent GroupWise from timing out before the application opens.

- Click Tools ► Options ► double-click Documents.
- Click the **Integrations** tab.
- In the Registered Application box, click the application for which you want to specify the wait interval.

Click Advanced ▶ click the Non-Integrated tab.



- Click **This Application** to apply the wait interval to the selected application.
 - Click **Default for All Applications** to apply the wait interval to all nonintegrated applications.
- In the Wait Time to Detect Application box, type the number of seconds GroupWise should wait for the application to open.
- Click OK.

Returning Documents to the Library

Most of the time you open a document, make changes, and save it in the library without any interruptions; however, once in a while, the power goes out or the network goes down, and GroupWise can't copy your document back to the library. This also happens if you exit GroupWise while a document is open in an application or if you exit GroupWise before you close a non-integrated application. In these cases, GroupWise stores the document (including any changes) in the staging directory. The document stays in the staging directory until you return it to the library; however, as long as the document is in the staging directory, the document status is open and no one (including you) can open or edit the document.

When you have a document with an Open status in the staging directory, you can return it to the library and change its status two ways: you can use the Reset Document Status option, or you can use the Unreturned Documents dialog box.

Using Reset Document Status

Reset Document Status is available any time you right-click a document reference in your Mailbox or folders. You can use this option to immediately return a document to the library. When you do this, you can specify whether or not you want GroupWise to update the document in the library with the document in the staging directory.

If you have GroupWise update the document, GroupWise moves the document out of the staging directory, updates the document in the library with any changes, and makes the document available. If you do not have GroupWise update the document, GroupWise deletes the document out of the staging directory and makes the document available.

Returning a Document to the Library and Marking it Available

- Right-click the document reference in your Mailbox or folder.
- Click Reset Document Status.



Make sure that both Mark the Document as Available and Return the Document to the Library are selected ▶ OK.

Marking a Document Available Only

- Right-click the document reference in your Mailbox or folder.
- Click Reset Document Status.
- Click Mark the Document as Available.
- Make sure that Return the Document to the Library is not selected.
- Click OK.

Tips

This changes the status of the document in the library and makes the document available; however, this does not update the document in the library with any changes you made while you had the document open.

Using Reset Document Status in Remote

When you use Reset Document Status in your Remote Mailbox, you can specify whether or not you want to return the document to the Master Library. Use the Make the Document Available in the Master Library option to remove the In Use status and make the document available in the Master Library without updating the document.

Right-click the document reference in your Remote Mailbox.

2 Click Reset Document Status.



3 To make the document available without updating the document in the Remote Library, click **Mark the Document as Available in the Remote Library**.

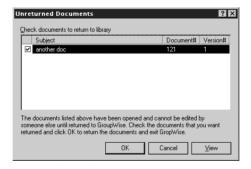
or

To make the document available and update the document in the Remote Library, click Mark the Document as Available in the Remote Library click Return the Document to the Remote Library.

4 To change the document status from In Use to Available in the Master Library, click Mark the Document as Available in the Master Library.

Using the Unreturned Documents Dialog Box

When you start or exit GroupWise, GroupWise checks the registry file to see if you have any documents open in the staging directory. If you do, GroupWise lists all the documents in the Unreturned Documents dialog box. (Unlike the Reset Document Status option, there's no way to manually access the Unreturned Documents dialog box.)



At this point, you can click the check box to select the documents (by default all are selected) you want to return to the library, and have GroupWise return them. Or you can switch to the application in which you created the document and return the documents (by saving or closing them) yourself. If you switch to an integrated application, closing the document returns it to the library. If you switch to a non-integrated application, you must close the application to return the document to the library.

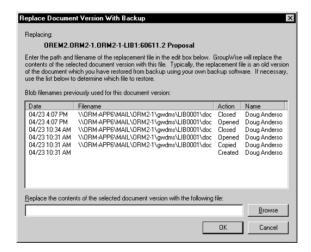
Replacing a Document with a File from Backup

You can replace a document in the library with a file you've restored from a backup system or with any other file. This is useful if documents have become corrupt through machine failures, network problems, and so on. To do this, you must be a librarian in the GroupWise Library where the document is found, or you must be a librarian in any GroupWise Library and have Edit rights to the document.

If a file needs to be restored from a backup system and you are uncertain which one to restore, you can see a list of all the blob filenames that have ever been assigned to that document version. To restore a file from a backup, follow the directions for your standard backup software. Then you can replace the corrupt document with the restored file in GroupWise using Replace Document with Backup.

You can use this feature in Remote only if the document has been downloaded and marked In Use.

- Click the document reference.
- Click Tools ▶ Replace Document with Backup.



If necessary, look at the entire list of blob filenames that have been assigned to that document version and decide which file needs to be restored from backup files.

Skip to Step 6.

- If necessary, exit GroupWise. Using standard backup software, restore the
- Start GroupWise and repeat Steps 1 and 2.

Specify the path and filename for the file that will replace the document.

Tips

- To replace a document, you must be a librarian in the GroupWise Library where the document is found, or you must be a librarian in any GroupWise Library and have Edit rights to the document.
- Use this feature when documents become corrupt through system failures and other problems.
- You can use this feature in Remote only if the document has been downloaded and marked In Use.

Using GroupWise Away from the Office

Using GroupWise Remote: An Overview

GroupWise® Remote makes it possible for you to access your Mailbox and send and receive mail, among other things, when you are away from the office.

Master and Remote Mailboxes

To use GroupWise away from your office, you must have an existing GroupWise Mailbox, called your Master Mailbox, in your master GroupWise system. You retrieve a copy of your Master Mailbox to your laptop or home computer. This copy is called your Remote Mailbox.

Remote exchanges items and information between your Master Mailbox and the Mailbox on your Remote computer. When you use GroupWise in the office, the Mailbox you open is your Master Mailbox. When you use GroupWise away from your office, the Mailbox you open is your Remote Mailbox.

When you send an item from your Remote Mailbox, Remote sends the item to your master GroupWise system the next time you connect. From there, GroupWise distributes it to the recipients. When someone at your master GroupWise system sends an item to you, it is delivered to your Master Mailbox. You then use Remote to retrieve the item to your Remote Mailbox.

Sending and Retrieving Items

Whenever you perform an action, such as sending a mail message, that requires information to be sent to your Master Mailbox, Remote creates a request. For example, requests are created whenever you perform any of the following actions:

- Send, forward, or reply to an item
- Create a posted item, folder, group, or rule
- Open, delete, retract, or undelete an item; or empty the Trash
- Request to download items, folders, and more from your Master Mailbox
- Move an item to or from a folder
- Change, enable, or disable a rule
- Delete a folder or rule

All requests are listed in the Pending Requests to Master Mailbox dialog box. When you connect to your GroupWise system, listed requests are sent to your Master Mailbox. For example, if you request all unopened mail messages, that retrieval request is sent to your Master Mailbox. Your Master Mailbox collects the items you requested, then GroupWise retrieves them to your Remote Mailbox.

Connection Types

To access your Master Mailbox, you must connect to your GroupWise system through a modem connection, a network connection, or a TCP/IP connection.

You will most likely use Remote away from the office with a computer that has no network access. In these situations, you can use a TCP/IP connection or a modem connection to connect to your master GroupWise system. Modem connections dial into a gateway in your GroupWise system. TCP/IP connections use unique IP (Internet Protocol) address and port information to connect to your master GroupWise system.

You can also use Remote in your office and connect to your master GroupWise system via a TCP/IP connection or a network drive mapping. These connections are useful to download large quantities of information, such as your system address book.

Using GroupWise Features in Remote

After setting up your Remote Mailbox on a laptop or on a desktop computer that is not in your office, you can use GroupWise away from your office.

When performing the following common GroupWise tasks in your Remote Mailbox, the actions are saved as requests. The next time you connect to your master GroupWise system, the requests are processed by your Master Mailbox.

- Read, edit, or delete an item
- Reply to an item
- Forward, delegate, or resend an item
- Move or link an item
- Accept, decline, or complete an item
- Empty the Trash
- Create folders or move items into folders
- Create or edit rules
- Create or edit personal address books

Other common GroupWise tasks remain specific to your Remote Mailbox setup and are never sent to or retrieved from your Master Mailbox.

- Set options
- Create, delete, or save views
- Set alarms
- Print
- Filter or sort items
- Spell-check

The following GroupWise features are not available in your Remote Mailbox because they do not apply in a remote situation.

- Access List
- Archive
- Proxy

Using Smart Docking

GroupWise automatically processes outstanding Remote requests when you run GroupWise on your docked laptop after you return to the office. For example, you may have sent an item while you were away from your office, but didn't connect to the master GroupWise system to process that request. When you return to the office and run GroupWise, you are asked if you want to process the outstanding requests. To see what requests still need to be processed, click Requests.

Making Sure You're **Using Your Remote** Mailbox

The Remote Mailbox and Master Mailbox are almost identical. However, you can tell which Mailbox you are using by looking at the menu bar. If your menu bar includes the Remote menu, you are running GroupWise against your Remote Mailbox.

The Remote menu displays when you are using your Remote Mailbox.



Preparing to Use Remote

Before leaving the office, you need to use Hit the Road to set up and update your Remote Mailbox. If you run GroupWise on a docked laptop in your office, use Hit the Road to create your Remote Mailbox on the same machine. You can also use Hit the Road to create setup files on a diskette to set up your Remote Mailbox on a laptop or a computer that's not connected to your network, such as your home computer. Multiple users can also set up their Remote Mailboxes on a single computer, such as a shared notebook computer.

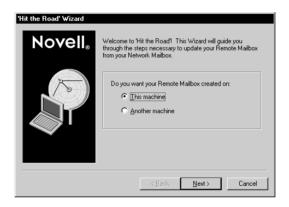
When you first use Hit the Road, it does the following:

- Prompts you to assign a password to your Master Mailbox if you haven't assigned one yet.
- Sets up your Remote Mailbox on the docked laptop that is currently connected to the network with your master GroupWise system, or copies setup files on a diskette so you can set up a computer that has no direct network access.
- Creates a network (direct) connection if you're connected to the post office via a drive mapping, or creates a TCP/IP connection if you're running GroupWise in client/server mode.
- Creates the modem connections you choose from a list of asynchronous gateways detected in your master GroupWise system.

When your laptop is docked and you're running GroupWise on the network, use Hit the Road to update your Remote Mailbox with messages, rules, address books, and documents from your Master Mailbox. Updating your Remote Mailbox before leaving your office saves you time and money, and ensures that you have the necessary information with you. When you're away from your office, use Send/Retrieve to retrieve the Master Mailbox items.

Setting Up Your Remote Mailbox

- Make sure GroupWise is installed on the computer where you want to set up your Remote Mailbox.
- Make sure you have a password on your Master Mailbox.
- Run GroupWise in your office on your docked laptop or a workstation.
- Click Tools > Hit the Road.



- Type your Mailbox password ► click OK. If a Remote Mailbox has been set up previously and you want to create additional setup diskettes, click Back > Back.
- To create your Remote Mailbox on the docked laptop that is currently connected to the network with your master GroupWise system, click This Machine ► Next.

If you click **This Machine** and GroupWise is not installed on the docked laptop, you are prompted to install GroupWise. To use GroupWise away from your office, click Yes to install GroupWise on the computer you're traveling with.

or

To create a setup diskette for another computer, such as your home computer, click Another Machine Next. Have a diskette ready. When your setup diskette is created, insert it into the computer where you want to set up your Remote Mailbox (such as your home computer) > run SETUP.EXE from the diskette. Go to Step 10.

- 7 Type the path for your Remote Mailbox ▶ click Next.
- Select the phone numbers you'll use to connect to your Master Mailbox.
- Select the items you want to copy to your Remote Mailbox ▶ click Finish.
- **10** Exit GroupWise.
- **11** Right-click the Windows desktop ► New ► Shortcut.
- 12 In the Command Line box, type c:\novell\groupwise\grpwise.exe /ps-<PATH **TO REMOTE MAILBOX>**. See Step 7 for path information.
- 13 Click Next.
- **14** Type a name for the shortcut, such as Remote.
- 15 Click Finish.

After setting up your Remote Mailbox, you can begin sending/retrieving items and Address Book information from your Master Mailbox.

Setting Up Multiple Remote Mailboxes On a **Shared Computer**

- 1 Run the network version of GroupWise • click Tools • Hit the Road.
- 2 To create a Remote Mailbox setup diskette, click Another Machine.
- Log in to Windows on the shared computer using a unique username.
- Insert the setup diskette into the shared computer ► run SETUP.EXE from the diskette.

Make sure GroupWise is installed on the shared computer.

- Select a folder for your Remote Mailbox files ► click **OK**.
 - This folder will not be shared with other users.
- To run GroupWise against your Remote Mailbox, each user should log in to Windows with a unique username before starting GroupWise.

Tips

The above steps should be completed by each user who is setting up a Remote Mailbox on the shared computer.

Updating Your Remote Mailbox

If you're running GroupWise in your office on a computer that has a connection to the network or a TCP/IP connection, click Tools > Hit the Road ► type your Master Mailbox password ► click OK.

or

If you're running GroupWise away from your office, click Remote > Send/Retrieve to retrieve your Master Mailbox items through a modem or TCP/IP connection.



- To retrieve messages, make sure Items is selected > click Advanced > click available options on the Retrieve, Items, Size Limits, and Folders tabs ▶ click OK.
- To retrieve rules, click Rules to select it.
- To retrieve addresses from the system address book, click System Address Book ► Filter ► specify the addresses to retrieve ► click OK.
- To retrieve your personal address books, click Personal Address Books to select it.
- To retrieve copies of documents from your Master Mailbox, select the **Documents** check box ▶ click **Documents** ▶ select your documents ▶ mark applicable documents as In Use ► click OK.

Marking a document as In Use prevents others from modifying the document. If you don't plan to edit a document, don't mark it In Use. When you exit an In Use document, you're asked to send the document to the Master Library and mark it as Available. If you're done with the document, the document should be marked Available to allow others editing access to it. To use Remote to mark a document Available or to send the document to the Master Mailbox without marking it Available, you must be using GroupWise 5.5 and a GroupWise 5.5 Post Office Agent.

Click Connect or Finish.

Tips

- If you don't mark a document as In Use, someone can edit it while you have the copy in your Remote Mailbox. If you then edit the document and return it to the Master Library, your document is saved as a new version. When this happens, a mail message notifies you, the remote user, and other users that a new document version is created. Other users include the document creator, the document author, the creator of the version you retrieved into your Remote Mailbox, and the last person who opened or checked out that version. If you get this notification, you should make sure that all updates are included in the new document version.
- You can unmark the In Use status of a document that you're not currently editing. Right-click the document in your Mailbox ▶ click Reset Document Status.
- When your laptop is docked and you're running GroupWise on the network, you can update your Remote Mailbox without using a modem connection.
- For help on a dialog box option, click ! the option.

Specifying Remote Options

When you use Hit the Road to set up your Remote Mailbox, your connection, modem, user, and system information is set up for you in Remote Options. If any of this information changes or if you want to set up additional connections, enter the new information in Remote Options. Your user ID, domain, and post office information is in the system address book. If you need help getting this information, ask your system administrator.

Remote Options also lets you automatically connect to your Master Mailbox at regular intervals to update your Remote Mailbox with new items. GroupWise uses the connection you last used. For example, if you're at home and connected to your Master Mailbox with a modem connection, the same connection will be used for the periodic updates.

If you travel to an area outside of your usual time zone for an extended period of time, you can change the time zone in Windows® to match the local time. Remote Options lets you access the Windows Date/Time Properties dialog box to change your time zone settings.

By default, deletions in the Remote Mailbox and Master Mailbox are synchronized. For example, if you delete an item from your Remote Mailbox, the item will be deleted from your Master Mailbox the next time you connect. You can use Remote Options to change the deletion options, so that an item deleted from your Remote Mailbox will stay in your Master Mailbox. Conversely, you can set the deletion options to leave items deleted from the Master Mailbox intact in your Remote Mailbox.

Specifying Time Zone Settings

The items in your Calendar are scheduled according to the time zone settings in the Windows Date/Time Properties. You can access this dialog box in Remote Options. If you use GroupWise in another time zone, you can change to that new time zone so that your scheduled items reflect the time zone difference.

Typically, if you're leaving your office for several days, you will use your Calendar information to attend and schedule appointments. Therefore, you will need to use the local time zone. However, if you're leaving your office for a short time, (for example, a day), you will probably keep the same time zone as your master GroupWise system.

IMPORTANT: If you change time zone settings, be sure to change your computer's clock to match the new time zone. For more information about using Date/Time Properties, see your Windows documentation.

- Click Tools ▶ Options ▶ double-click Remote.
- Click Time Zone ▶ the current time zone ▶ click OK. You can click your current time zone in the map or the drop-down list.
- Change your computer's clock to match the new time zone.

Connecting to Your Master Mailbox At Regular Intervals

- Click Tools ► Options ► double-click Remote.
- Select Check for New Messages ▶ specify the period in minutes.
- 3 Click **OK**.

Tips

- Your computer must stay connected to the network or phone line, depending on the connection you're using.
- If GroupWise is unable to connect to the master GroupWise system, you are prompted whether you want to keep trying to connect at the interval you have specified or whether you want to turn Check for New Messages off.

Specifying User and System Information for Your Remote Mailbox

- Click Tools ▶ Options ▶ double-click Remote.
- In the **Full Name** box, type your first and last name.
 - This name appears in the From box of an item you send someone. The name is also used as your user folder name.
- Type your GroupWise user ID.

- **4** Click **Password** ▶ type your Master Mailbox password ▶ click **OK** ▶ retype the password ▶ click **OK**.
 - Your Master Mailbox must have a password before you can use Remote.
- **5** Type the domain name of your Master Mailbox.
- **6** Type the post office name of your Master Mailbox.

Tips

If you have not assigned a password to your Master Mailbox, do so in Security Options while running GroupWise in your office. You cannot use Remote to assign or change your Master Mailbox password. To set a password for your Remote Mailbox only, run GroupWise against your Remote Mailbox ➤ click Tools ➤ Options ➤ double-click Security ➤ type the password ➤ type the password again ➤ click OK.

Changing Remote Delete Options

- 1 Click Tools ➤ Options ➤ double-click Remote.
- 2 Click the Delete Options tab.
- **3** Make your changes ▶ click **OK**.

Tips

If you are not using GroupWise 5.5 and a GroupWise 5.5 Post
Office Agent, the Never Delete The Item From Remote Mailbox
option will not work; items that you delete from your Master
Mailbox will be deleted from your Remote Mailbox.

Sending and Retrieving Items in Remote

Use Send/Retrieve to synchronize your Master Remote Mailboxes.

When you connect to your master GroupWise system, items you sent from your Remote Mailbox are delivered to the recipients. Remote also sends a request to your Master Mailbox to retrieve your items, such as mail. Your master GroupWise system processes the request, then sends your items to your Remote Mailbox, restricting the items according to the limits you set in the Retrieve Options dialog box.

In addition to mail, you can retrieve appointments, tasks, reminder notes, rules, documents, and address books. When retrieving documents, mark a document as In Use when you want to prevent others from modifying it. If you don't mark a document as In Use, someone can edit it while you have a copy in your Remote Mailbox. If you then edit the document and return it to the Master Library, your document is saved as a new version. When this happens, a mail message notifies you, the remote user, and other users that a new document version is created. Other users include the document creator, the document author, the creator of the version you retrieved into your Remote Mailbox, and the last person who opened or checked out that version. If you get this notification, you should make sure all updates are included in the new document version.

When you exit an In Use document, you're asked to send the document to the Master Library and mark it as Available. If you're done with the document, the document should be marked Available to allow other users editing access to it. To use Remote to mark a document Available or to send the document to the Master Library without marking it Available, you must be using GroupWise 5.5 and a GroupWise 5.5 Post Office Agent.

Sending Mail from Your Remote Mailbox

On the toolbar, click

section.

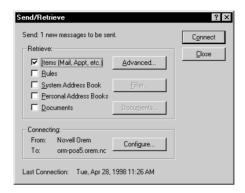


In the To box, type the recipient names. You can also use the Address Book to select recipient names.

Type the subject and the message ▶ click Send.

Remote places the mail in the Pending Requests list. When you connect to your master GroupWise system, all items in the Pending Requests list are sent. For more information, see *Viewing Pending Requests* later in this

4 Click Remote ▶ Send/Retrieve.



- **5** To specify where you're dialing from, click **Configure** ▶ the **Connecting** From drop-down list ▶ the remote location.
- 6 To select a connection to your Master Mailbox, click the Connecting To drop-down list ▶ the modem, network, or TCP/IP connection to your Master Mailbox ▶ OK.
- 7 Click Connect.

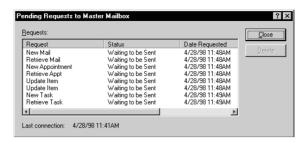
Tips

- Besides mail, you can send other items, including appointments, reminder notes, and so on.
- You can click Remote > Send/Retrieve > Configure > Connect
 From to access the Windows Dialing Properties dialog box to create
 additional remote locations or change existing settings. For help on
 this dialog box, see your Windows documentation.
- You can switch between connection types (network, modem, and TCP/IP) if there are no pending requests on the connection you are switching from. For example, if you're sending and retrieving items with a network connection and disconnect before the transmission is complete, you should not switch to a modem connection later to process the requests. Complete the original request with the original connection.

Viewing Pending Requests

Whenever you perform an action that requires information to be sent from your Remote Mailbox to your Master Mailbox, Remote creates a request that is placed in the Pending Requests list. When you connect to your master GroupWise system, all the requests are sent to your Master Mailbox. Use Pending Requests to check for outstanding requests.

Click Remote > Pending Requests.



Tips

To prevent a request from being processed, click the request • **Delete.** Only requests that haven't been sent to the master GroupWise system and have the "Waiting to be Sent" status can be deleted. If you've already sent a request to the master GroupWise system, you cannot cancel the request.

Retrieving Items from Your Master Mailbox

- Click Remote > Send/Retrieve > make sure Items is selected > Advanced. 1
- 2 To specify the items to retrieve, click the appropriate options from the Retrieve, Items, Size Limits, and Folders tabs ▶ click OK.
- 3 To retrieve copies of documents from your Master Mailbox, select the Documents check box ► click Documents ► select the documents ► mark applicable documents as In Use > click OK.
 - Marking a document as In Use prevents others from modifying the document. If you don't plan to edit a document, don't mark it In Use. When you exit an In Use document, you're asked to send the document to the Master Library and mark it Available. If you're done with the document, the document should be marked Available to allow others editing access to it. To use Remote to mark a document Available or to send the document to the Master Library without marking it Available, you must be using GroupWise 5.5 and a GroupWise 5.5 Post Office Agent.
- To specify where you're dialing from, click Configure ▶ the Connecting From drop-down list ▶ the remote location.
- To select a connection to your Master Mailbox, click the Connecting To drop-down list ▶ click the modem, TCP/IP, or network connection to your Master Mailbox ▶ click OK.

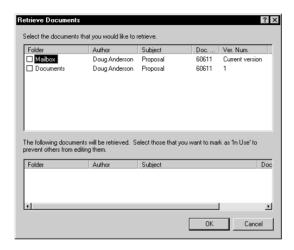
Tips

- If documents on your server are deleted while you're away, they are deleted from your Remote Mailbox the next time you connect to your master GroupWise system.
- If you don't mark a document as In Use, someone can edit it while you have the copy in your Remote Mailbox. If you then edit the document and return it to the Master Library, your document is saved as a new version. When this happens, a mail message notifies you, the remote user, and other users that a new document version is created. Other users include the document creator, the document author, the creator of the version you retrieved into your Remote Mailbox, and the last person who opened or checked out that version. If you get this notification, you should make sure that all updates are included in the new document version.
- You can unmark the In Use status of a document that you're not currently editing. Right-click the document in your Mailbox click Reset Document Status.
- You can click Remote ► Send/Retrieve ► Configure ► Connect From to access the Windows Dialing Properties to create additional remote locations or to change existing settings. For help on this dialog box, see your Windows documentation.
- By default, GroupWise transfers all document references in your Master Mailbox to your Remote Mailbox. If you don't want the document references, click the **Documents** pop-up list ▶ **None**.
- When you send requests to retrieve items from your Master Mailbox, the master GroupWise system processes the request, then GroupWise retrieves the items into your Remote Mailbox. In addition, any items waiting to be sent to your Master Mailbox will be delivered when you connect.
- You can switch between connection types (network, modem, and TCP/IP) if there are no pending requests on the connection you are switching from. For example, if you're sending and retrieving items with a network connection and disconnect before the transmission is complete, you should not switch to a modem connection later to process the requests. Complete the original requests with the original connection.

Retrieving Documents into Your Remote Mailbox

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote > Send/Retrieve > select the Documents check box ▶ click Documents.

If you're in your office and run GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password ► click OK ▶ select the Documents check box ▶ click Documents.



Click the documents you want in the upper list box.

3 As selected documents appear in the lower list box, click the documents you want to edit to mark them as In Use ➤ OK.

Tips

- If a document is deleted in the Master Library while you are using Remote, it is deleted from your Remote Mailbox the next time you connect to your master GroupWise system.
- Mark a document as In Use only when you want to prevent others from modifying it. If you don't mark a document as In Use, someone can edit it while you have a copy in your Remote Mailbox. If you then edit the document and return it to the Master Library, your document is saved as a new version. When this happens, a mail message notifies you, the remote user, and other users that a new document version is created. Other users include the document creator, the document author, the creator of the version you retrieved into your Remote Mailbox, and the last person who opened or checked out that version. If you get this notification, you should make sure all updates are included in the new document version.
- When you exit a document, a prompt lets you choose to send the document to the Master Library and mark it as Available. If you're done with the document, it should be marked Available to allow others editing access to it. To use Remote to mark a document Available or to send the document to the Master Library without marking it Available, you must be using GroupWise 5.5 and a GroupWise 5.5 Post Office Agent.
- You can also right-click the document in your Mailbox ▶ Reset Document Status to clear the In Use status.

Limiting the Items You Retrieve

You can save time and disk space by restricting the items you retrieve from your Master Mailbox. You can retrieve items of a specific size or from a specific folder. You can specify the range of dates of items you want to retrieve, or retrieve all items since you last connected. In addition, you can retrieve just the subject line of items so you can review an item before you retrieve it in its entirety.

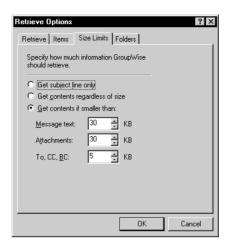
Retrieving Items of a Specific Size Only

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote > Send/Retrieve > Advanced.

or

If you're in your office and running GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password ▶ click OK ▶ Advanced.

Click the **Size Limits** tab.



- Click Get Contents If Smaller Than.
- Specify the size limits (in kilobytes) for the message text, attachments, and the addressing fields.

Tips

- If you retrieve an item that exceeds one of the size limits, the part of the item that exceeds the limits will not be retrieved. For example, if an attachment exceeds the size limit, only the message text and addressing field information will be retrieved. To retrieve the attachment, double-click the attachment icon in the opened item. Click Yes when prompted whether you want to retrieve the attachment.
- For help on a dialog box, click the options.

Retrieving Items from Specific Folders

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote > Send/Retrieve > Advanced.

or

If you're in your office and running GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password ▶ click OK ▶ Advanced.

Click the Folders tab ▶ the folders ▶ OK.

A check mark indicates a folder is selected. To select items from all folders, leave all the folders unselected.

Retrieving Items Received Between Specific Days or Since You Last Connected

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote > Send/Retrieve > Advanced.

If you're in your office and running GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password ▶ click OK ▶ Advanced.

- 2 Click the **Retrieve** tab.
- Click Retrieve All Changes Since I Last Connected.

or

Click Retrieve Only Items within the Date Range > specify the number of days prior to or after today **\rightarrow** OK.

Tips

- Specifying 365 in the Days After Today box allows you to retrieve appointments scheduled up to a year from today.
- For help on a dialog box option, click \(\begin{aligned}
 \text{ the option.}
 \end{aligned}

Retrieving the Subject Line Only of Items

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote > Send/Retrieve > Advanced.

If you're in your office and running GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password click OK > Advanced.

2 Click the Size Limits tab ► Get Subject Line Only ► OK.

Tips

Retrieving Selected Items

If you use the Get Subject Line Only and Get Contents If Smaller Than options to retrieve items from your Master Mailbox, you can scan the retrieved items and decide which ones to retrieve in their entirety. Use Retrieve Selected Items to retrieve the rest of a selected item, including the entire message and any attachments, regardless of previous size and filter criteria.

- Select the items in your Remote Mailbox.
- Click Remote ▶ Retrieve Selected Items.
- To connect immediately to your Master Mailbox, click Connect Now.

To create the request but not send it, click Connect Later. This way, you can wait until you have several requests and connect later.

Tips

To retrieve an item, you can also right-click the item ▶ click Retrieve Selected Items.

Retrieving a Personal Address Book

If you're away from your office and running GroupWise against your Remote Mailbox, click Remote ➤ Send/Retrieve.

If you're in your office and running GroupWise against your Master Mailbox, click Tools ► Hit the Road ► type your Master Mailbox password ▶ click OK.

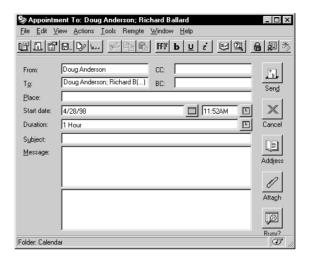
2 Click Personal Address Books ▶ deselect all other options ▶ click Connect.

Tips

Because retrieving an address book can take a long time, we recommend retrieving it through a network or TCP/IP connection while you're at your office.

Using Busy Search in Remote

1 On the toolbar, click



- 2 Type the participants and resources in the To box.
 If you're typing several user and resource IDs in the To box, press Enter between entries.
- **3** To select the first possible meeting day, click ► a date ► OK.
- 4 Click Busy.



5 To immediately connect to your master GroupWise system and search for available times, click **Connect Now**.

or

To search for available times later, click Connect Later.

Clicking Connect Later creates a Busy Search request, but doesn't send the request to the master GroupWise system. You can save your appointment as a draft item in the Work In Progress folder until you are ready to send it.

When you're ready to check appointment times later, click **Busy** • Connect Now.

When the Choose Appointment Time window appears, click Auto-Select for the first available meeting time. Click Auto-Select until the best available time is displayed ▶ click OK.

Instead of using Auto-Select, click the **Available Times** tab ▶ an available time ▶ OK.

Complete the appointment ► click **Send**.

Tips

- If you're disconnected before all schedule information returns from a busy search, clicking **Busy** again lets you update the information from the original busy search request.
- To remove a user or resource from the Invite To Meeting list after the search, click the Available Times tab > the user or resource > press Delete > Yes. This is useful when, for example, you are searching several conference rooms for availability; you can find the one that meets your needs and eliminate the rest.
- If you're inviting someone to the meeting whose schedule has no impact on the meeting time, such as a carbon copy recipient, you can exclude that user from the busy search. Click the Available Times tab ► deselect the check box next to the user or resource. The check mark by the name disappears.
- To specify where you're dialing from, click **Remote** Send/Retrieve ► Configure ► the Connecting From drop-down list ▶ the remote location ▶ OK.
- To select a connection to your Master Mailbox, click Remote > Send/Retrieve ► Configure ► the Connecting To drop-down list ► the modem, TCP/IP, or network connection to your Master Mailbox ► OK.
- For help on a dialog box option, click ! the option.

Filtering the System Address Book for Your Remote Mailbox

The system address book is usually large, because it contains information for your entire organization. If you don't need all the information in the system address book when using GroupWise away from your office, use System Address Book Filter to retrieve only the user addresses, resource addresses, and public groups you need from the GroupWise system.

For example, the filter statement, Dept [] Marketing, instructs GroupWise to retrieve all addresses with "Marketing" in the Department column in the Address Book. This way you can contact anyone from your Marketing department while you're traveling.

You should also retrieve system address book information before leaving your office to save downloading time and costs, especially if you're planning to travel to a location where you will incur long-distance phone charges.

- 1 Before leaving your office, click Tools ► Hit the Road.
- 2 If you're prompted for a password, type your Mailbox password ► click OK. If you haven't set up your Remote Mailbox, do so now.
- 3 Click System Address Book ► Filter.



- 4 Click an Address Book column in the first drop-down list.
 For example, click Dept to search for addresses from a specific department.
- **5** Click the operator drop-down list ▶ click an operator ▶ type your search criteria in the box or click a value, if provided.
 - For example, click [] type Accounts to search for addresses from the Accounts department. Use the operator that is most appropriate for your search. Your search criteria, such as a person's name or a subject, can include wildcard characters such as an asterisk (*) or a question mark (?) Filter is not case-sensitive to the criteria you type.
- 6 To add more filter conditions, click the last drop-down list ► And.
- 7 After specifying all filter conditions, click OK.
- **8** Read the text beginning with "Include entries where..." as you create your filter. This summarizes how your filter will work.

Tips

- To filter the system Address Book while you're away from the office, click Remote ► Send/Retrieve and follow Steps 3 to 7. It is best to retrieve your Address Book through a network connection while you're at your office, since this process can take a long time.
- If you have defined several rows of filter conditions, you can remove a row by clicking the last drop-down list Delete Row.
- For more information on operators see *Filtering* under *Finding Items* in *Your Mailbox*.

Deleting Items in Your Remote Mailbox

Use Delete, Empty Trash, and Remote Disk Space Management to remove items from your Remote Mailbox and to free up disk space.

Deleting Items In Your Remote Mailbox

If you sent an item with old or wrong information, or you need to reschedule an appointment, use Delete to retract that obsolete item from the recipients' Mailboxes. You can retract mail and phone messages from the Mailboxes of those recipients who haven't opened them. Appointments, reminder notes, and tasks can be retracted at any time.

The next time you connect to your master GroupWise system, the changes in your Remote and Master Mailboxes will automatically synchronize. You can turn off this synchronization by changing the delete options in Remote Options. See Preparing to Use Remote under Using GroupWise Away from the Office.

- Click the item in your Mailbox.
- Click Edit ▶ Delete.
- If you're deleting an outgoing item, click one of the available options.
- To free up disk space, click **Edit** ▶ Empty Trash. This permanently removes all deleted items from your Remote Mailbox.
- To synchronize your Remote and Master Mailboxes, connect to your master GroupWise system.

Tips

- Waiting until you have several send and retrieve requests before connecting saves you time and money.
- In Step 2, you can also click an item ▶ press the Delete key.
- If you don't want to synchronize deletions between your Remote Mailbox and Master Mailbox, click Tools ➤ Options ➤ double-click Remote ► click the Delete Options tab ► click the options you want.
- For help on a dialog box option, click ! the option.

Removing Unneeded Files From Your Remote Mailbox

Remote Disk Space Management lets you delete unneeded documents and stranded files from your Remote Mailbox. You see a list of the documents in your Remote Library, the document sizes, the document and version numbers, and the last accessed or modified dates. The list is sorted by file size.

When you work in a document after connecting to the Master Mailbox, the date of that action appears in the Accessed column. Actions include opening, viewing, printing a document and so on, but don't include retrieving a file from the

Master Library. Documents that are opened after connecting to your Master Mailbox also have a date logged in the Modified column.

Deleting files with Remote Disk Space Management will not remove them from the Master Library. It will also not remove the document references for the deleted documents. The files are only removed from the computer where you have your Remote Mailbox, freeing disk space for you. If you delete an In Use document, its status is reset to Available in the Master Library the next time you connect.

- Click Remote > Disk Space Management. 1
- Click the document you want to delete ▶ click **Delete**.
- When you're done, click Close.

Tips

You can select multiple documents using Shift+click for consecutive documents or Ctrl+click for nonconsecutive documents.

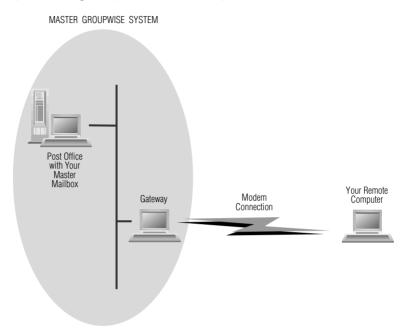
Configuring Your Remote Connections

To access your Master Mailbox to send or retrieve information, you must connect to your master GroupWise system through a modem connection, a network connection, or a TCP/IP connection. When you use Hit the Road to set up your Remote Mailbox, GroupWise creates the appropriate connections based on how you are currently running GroupWise.

For example, if you use a drive mapping to connect to your GroupWise post office, GroupWise creates a network connection and the modem connections for all asynchronous gateways detected in your master GroupWise system. If you're running GroupWise in client/server mode, GroupWise creates a TCP/IP connection instead of a network connection. You can create new connections as well as change or delete existing ones. When creating a new connection, you can copy an existing connection, then edit the duplicated settings to create the new connection without redoing every setting.

Modem Connections

In most cases, you will use a modem to connect to your master GroupWise system via a gateway when you are away from the office.



Your modem uses the information from the Connection Configuration dialog box to connect to your Master Mailbox.

A modem connection is similar to a phone call. You need the telephone number of your master GroupWise system that is part of the Connect To information. Other Connect To information includes the ID and password of the gateway you're connecting to.

As in a phone call, dialing prefixes may change when you connect from a different location. For example, when you're at a hotel, you often need to dial 9 to access an outside line. If you're at home, you don't need this prefix. You'll need to set up the dialing information for each remote location. After setting up the dialing properties for your remote locations, use Connect From in the Connection Configuration dialog box to select a remote location when connecting to your Master Mailbox. For more information about setting dialing properties for each remote location, see your Windows documentation.

TCP/IP Connections

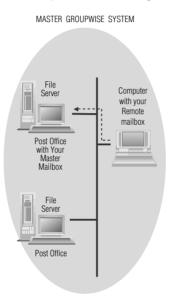
TCP/IP connections use an IP (Internet Protocol) address and port to connect to your master GroupWise system.

If you use a toll-free Internet provider while you are away from the office, you can avoid phone charges by using a TCP/IP connection. In addition, you don't need to exit an Internet connection and hang up the phone to connect to your

master GroupWise system via a modem connection. You can use the same Internet connection to connect to your master GroupWise system. If you're connected to your Master Mailbox in client/server mode and use Hit the Road to set up your Remote Mailbox, GroupWise detects the IP information and uses it to create a TCP/IP connection for you. If you need the IP information, check with your system administrator.

Network Connections

When you're at the office, you can run GroupWise against your Remote Mailbox and connect to your master GroupWise system through the network.

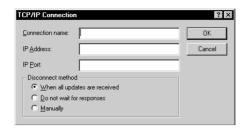


A network connection is useful for retrieving large amounts of information, such as your system address book, because it transfers information faster than a modem connection and saves long-distance phone charges.

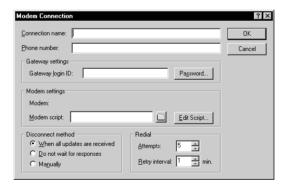
Creating a Modem Connection

- 1 Click Tools ► Options ► double-click Remote.
- 2 Click Connections ► Connect To ► New.

Make sure Modem is selected ▶ click OK.



- **4** In the Connection Name box, type a description.
 - For Steps 5, 6, and 7 below, contact your system administrator for your gateway's phone number, login ID, and password.
- **5** Click the country code ▶ type the area code and phone number for the gateway to your master GroupWise system.
- **6** Type the gateway login ID.
- 7 Click Password ► type the gateway password ► click OK ► retype the password ► click OK.
- **8** Click the **Advanced** tab.
- **9** If your modem requires a script, click **Edit Script** ▶ specify the necessary When Given and Respond With commands.



To save the script without changing its filename, click Save ► Close.

or

To save the script with a new filename, click Save As ► Close.

- **10** Click a disconnection method.
- 11 Click Attempts > specify the number of times to redial if the line is busy.
- **12** Click **Retry Interval** ▶ specify the time interval between each redial attempt.

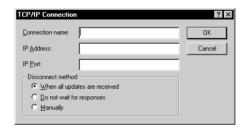
13 Click OK ➤ Close.

Tips

- If your modem requires a script to access your Master Mailbox, contact your system administrator. To retrieve an existing script file, click ☐ after Step 8 select the script file click Open.

Creating a TCP/IP Connection

- 1 Click Tools ➤ Options ➤ double-click Remote.
- 2 Click Connections ► Connect To ► New.
- 3 Click TCP/IP ➤ OK.



- **4** Type a descriptive name for the TCP/IP connection.
- **5** Type the IP address and port information provided by your system administrator.

Instead of an IP address, you can also type the DNS host name in the IP Address box. Check with your system administrator.

6 Click a disconnection method ► OK ► Close.

Tips

- You can also click **Remote** ► **Send/Retrieve** ► **Configure** to create a TCP/IP connection.

Creating a Network Connection

- 1 Click Tools ▶ Options ▶ double-click Remote.
- 2 Click Connections ► Connect To ► New.

Click Network ► OK.



- Type a descriptive name for the network connection.
- Type the path to any post office directory in your master GroupWise system. Contact your system administrator for the path to your post office. You can also connect to any post office in your master GroupWise system to access your Master Mailbox. You don't need to connect to the post office containing your Master Mailbox.
- Click a disconnection method ► OK ► Close.

Tips

- You can also click Remote > Send/Retrieve > Configure to create a network connection.
- For help on a dialog box option, click hthe option.

Copying a Modem, 1 Click Tools ► Options ► double-click Remote. **Network, or TCP/IP** 2 Click Connections ▶ Connect To ▶ a connection ▶ Copy. Connection 3 Modify the connection ▶ click **OK**. Editing a Modem, 1 Click Tools ► Options ► double-click Remote. **Network, or TCP/IP** 2 Click Connections ➤ Connect To ➤ the connection ➤ Edit. Connection 3 Make the necessary changes ▶ click **OK**. **Deleting a Modem,** 1 Click Tools ► Options ► double-click Remote. **Network, or TCP/IP** 2 Click Connections ▶ Connect To ▶ the connection. Connection 3 Click Delete ► Yes.

Specifying Your Remote Location

1 Click Tools ▶ Options double-click Remote ▶ click Connections.



- **2** To select your remote location, click the **Connect From** drop-down list ► the remote location.
- **3** To change the dialing properties of your modem, click **Connect From** ▶ specify changes in the Dialing Properties dialog box ▶ click **OK**.

Tips

 For help on specifying Dialing Properties, see your Windows documentation.

Using Your Phone with GroupWise

Using Dial Sender

Use Dial Sender to call the sender of an item. When you click Dial Sender, Conversation Place opens and completes your telephone call.

Calling the Sender of an Item

1 Click Tools ► Dial Sender.

Conversation Place opens, then it completes the telephone call for you.

Tips

• The sender must have a telephone number in order for Conversation Place to complete the call.

Using Conversation Place

Conversation Place lets you manage your telephone directly from your desktop. You can answer your phone, place callers on hold, use the speaker phone, conference other callers, and more. You can even look up phone numbers and dial numbers directly from Conversation Place.

Conversation Place is a component within the GroupWise environment. It exposes and simplifies many commonly available, yet little-used features of the telephone. Address Book is closely integrated with Conversation Place to provide quick and easy access to any user information listed in corporate and personal address books.

Conversation Place can control phones using either TAPI or TSAPI. TAPI requires either a modem or a TAPI service provider and TAPI32.DLL installed on client computers. TAPI32.DLL is installed by default when Windows® is installed. TSAPI requires a working TSAPI TServer, CSTA32.DLL, and Novell® Client 32™ installed on client computers.

Starting Conversation Place

In the GroupWise Main Window, click Tools > Conversation Place.



Calling Someone

- 1 Begin typing the name of the person in the Enter Name box until the name you want appears.
- Click Dial.

Tips

- If the person you want to call is not listed in your GroupWise Address Book, type the number you want to call in the Enter Phone Number box.
- To dial one of the ten most recent outgoing or incoming numbers, click Recent Calls ▶ the number.
- To quickly dial someone on your Speed Dial list, click Speed Dial > the name.
- To look up names and numbers in the GroupWise Address Book, click 📮

Placing a Conversation on Hold

Click Hold.

To reactivate a conversation, click Hold again. You can also click the button representing the conversation you want to reactivate on the Callbar at the bottom of the Conversation Place window.

Hanging Up

1 Click Hang Up.

Transferring a Call

- Click Transfer 1
- 2 Begin typing the name of the person in the Enter Name box until the correct name appears.
- To announce the new call to the person you are transferring to, click Dial announce the call > click Transfer.

To transfer immediately, click Transfer.

Tips

- If the person you want to call is not listed in your GroupWise Address Book, type the number you want in the Enter Phone
- To look up names and numbers in the GroupWise Address Book, click

Dialing a Recently Used Number

Click Recent Calls ▶ the phone number or name.

Tips

The ten most recent outgoing and incoming numbers appear on the Recent Calls list.

Dialing a Number Using Speed Dial

You can add numbers to your Speed Dial list in Conversation Place Options.

Click Speed Dial ▶ the number.

Placing a Conference Call

- While you have either an active conversation or a caller on hold, click Conference.
- 2 Begin typing the name of the person you want to conference in the Enter Name box until the correct name appears.
- Click Dial.

Tips

To look up names and numbers in the GroupWise Address Book, click 🔳

Merging Conversations

Use Merge to connect two existing conversations. For example, if you are talking to one caller while you have another caller on hold and you realize all three of you need to be in the same conversation, instead of hanging up on one caller and calling back to conference, you can simply merge the calls. If you have more than two active conversations, Conversation Place lets you choose the conversations you want to merge. To add a new caller to an existing conversation, use Conference.

While you have one caller on hold and an active conversation, click Merge.

Using the Phone Log

When you use Conversation Place to manage your phone, GroupWise creates a folder in the Folder List called Phone Log. Each time you make or receive a phone call while Conversation Place is open, GroupWise creates a corresponding item in the Phone Log folder that records the details of the call, such as the time of the call, the duration, and the identity of the caller. You can also record reminder notes about the details of calls you make and receive. GroupWise records these reminder notes as part of the item created in the Phone Log, and you can view the reminder notes at any time, just like any other item in your Folder List.

Creating Notes in the Phone Log

- If the Notes Box isn't displayed, click in the main Conversation Place window.
- Type in the Notes box that appears at the bottom of the Conversation Place window.
- Click **Close** to terminate the conversation.

The notes you type are recorded along with other details about the call in the Phone Log folder in the Folder List of the GroupWise Main Window.

Specifying Information About Your Location

Use Location Information to tell Conversation Place how your phone system works so your calls are dialed correctly. You can set default phone systems, extension number ranges, access methods, and city codes. You can create several settings and select the one appropriate to where you are working.

Creating a Location Setting

- Click Tools ► Locations.
- Specify the location options you want for this location.
- Click New. 3

4 Type a name for the new setting ▶ click **OK**.

Tips

You can create as many location settings as you want, and then use them wherever you go.

Selecting a Location Setting

- Click Tools ► Locations.
- Click a location name in the Location Name drop-down list.

Customizing GroupWise

Setting Options for GroupWise

Use Options to customize GroupWise® by setting options that are in effect each time you start GroupWise. You can set options that make your work more efficient, change how GroupWise looks, and accomplish specific tasks.

For example, you can use Environment Options to change the interface language GroupWise uses, or you can use Send Options to specify that you get a return receipt for every message you send. You can also use Options to subscribe to Notify, specify an archive folder, and so forth.

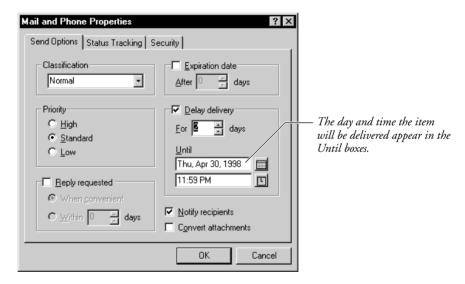
Delaying Delivery of an Item

1 To delay the delivery of one item, open an item view ▶ click File ▶ Properties.

or

To delay delivery of all items you send, click **Tools** ► **Options** ► double-click **Send**.

- 2 Click Delay Delivery.
- **3** In the Until boxes, specify the day and time you want the item delivered.



4 Click OK.

Getting a Return Receipt for Items You Send

To get a return receipt for one item, open an item view ▶ click File ▶ Properties.

or

To always get a return receipt for items you send, click **Tools ► Options ►** double-click **Send**.

- Click the Status Tracking tab.
- In the Return Notification group box, specify the type of return receipt you want.



Click OK.

Tips

To get a return receipt through Notify, you must first subscribe to Notify. See Running Notify.

Requesting a Reply for Mail and Phone Messages You Send

To request a reply for one item, open an item view ▶ click File ▶ Properties. 1

To request a reply for all items you send, click Tools > Options > doubleclick Send.

Click Reply Requested.

3 Specify when you want to receive the reply.



4 Click OK.

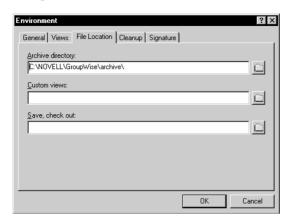
Tips

The recipient sees at the top of the message. If you select When Convenient, "Reply Requested: When convenient" appears at the top of the message. If you select Within x Days, "Reply Requested: By xx/xx/xx" appears at the top of the message.

Specifying Where Archived Items Are Stored

- 1 Click Tools ➤ Options.
- 2 Double-click Environment ▶ click the File Location tab.

3 Specify the location of your archive directory in the **Archive Directory** box.



4 Click OK.

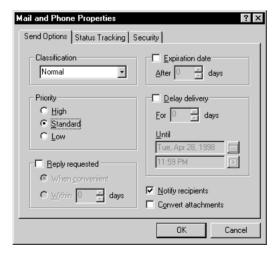
Changing the Priority of Items You Send

1 To change the priority of one item, open an item view ▶ click File ▶ Properties.

01

To change the priority of all items you send, click **Tools ► Options ►** double-click **Send**.

2 In the Priority group box, select High, Standard, or Low.



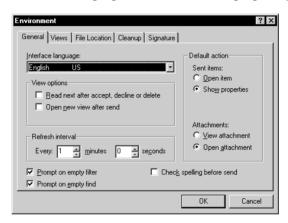
Click OK.

Tips

The small icon next to an item in the Mailbox is red when the priority is high, white when the priority is standard, and gray when the priority is low.

Changing the GroupWise Interface Language

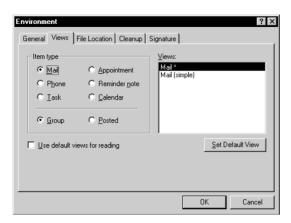
- 1 Click Tools ▶ Options.
- Double-click Environment click the General tab.
- Click a language in the Interface Language drop-down list ▶ click OK.



Changing Your Default Views

Click Tools ▶ Options.





- Click an item type.
- If the selected item type is Task, Appointment, or Reminder Note, select Posted or Group.
- Click the view you want as your default in the Views list box.
- Click Set Default View.

GroupWise marks the item as the default by placing an asterisk (*) next to the view name in the list box.

- Repeat Steps 3-6 until you have selected a default view for each view type.
- Click OK.

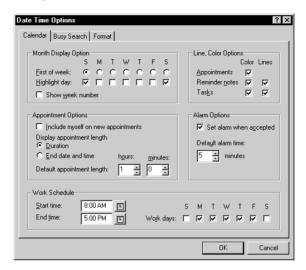
Tips

The group default views you select appear when you click the toolbar buttons. The personal default views you select appear when you double-click the Appointments, Reminder Notes, or Task Lists in the Calendar.

Specifying How Long Before an Event an Alarm Sounds

- Click Tools ▶ Options.
- 2 Double-click Date & Time ▶ click the Calendar tab.
- 3 Make sure **Set Alarm When Accepted** is selected.





Click OK.

Automatically Spell-Checking Every **Message You Send**

- 1 Click Tools > Options > double-click Environment.
- 2 Click Check Spelling Before Send.

Assigning Passwords to Your Mailbox

You can assign a password to your Mailbox to prevent others from accessing your GroupWise items without permission. Passwords are case-sensitive (for example, Wednesday is not the same as WEDNESDAY). Once you assign a password, you are prompted for it each time you open GroupWise. If you decide you no longer want to be prompted for a password, you can remove it.

If you want Windows® to remember your password the next time you log in as yourself on the machine, click Remember Password. You can also click No Password Required with NDS in Security Options to have Novell Directory Services store your GroupWise password. You can then log into GroupWise without typing in your password at any machine, as long as you are logged into NDS as yourself first.

If you forget your password, you will not have access to any of your items.

Setting a password for your Mailbox does not affect your proxies' ability to access your Mailbox. A proxy's ability to access your Mailbox is determined by the rights you assign him or her in your Access List.

To use GroupWise Remote, you must assign a password to your Master Mailbox. If you assign a password when you're running Remote, the password you create affects your Remote Mailbox only. For example, if you are running GroupWise Remote at home and you create a password in Security Options, the password you create is in effect only for your Remote Mailbox. The password does not affect your Master Mailbox at the office. If you selected No Password Required with NDS, you will still be prompted for a password when using Remote.

Creating a Password for Your Mailbox

- 1 In the Main Window, click Tools ▶ Options.
- Double-click Security > click the Password tab.
- 3 In the New Password box, type the password.
- In the Confirm New Password box, type the password ▶ click OK ▶ Close.

Removing Your Password

- 1 Click Tools ▶ Options.
- 2 Double-click Security • click the Password tab.
- 3 Type your old password ► click **OK**.
- Click Clear Password.
- Click OK ► Close. 5

Changing Your Password

- 1 In the Main Window, click Tools ▶ Options.
- 2 Double-click Security • click the Password tab.
- 3 In the Old Password box, type the password you want to change.
- In the New Password box, type the new password.
- In the Confirm New Password box, type the new password again ▶ click OK ► Close.

Tips

- If you forget your password, you will not be able to access GroupWise. Contact your system administrator for assistance.
- Passwords are case-sensitive.

Customizing Your Toolbar

Use the toolbar to access many of the features and options found in GroupWise. When you use certain features (for example, when you are in your Calendar), the toolbar for that feature appears.

To find out about a toolbar button, move the mouse pointer over the button and read the tool tip that appears.

Use the display settings drop-down list on the toolbar to change the display of your Item List. For example, you can display sent, received, or posted items. Click the drop-down arrow to see the available display settings.

You can customize each toolbar by adding and deleting buttons, choosing button order, and placing separators between buttons.

Choosing How Your Toolbar Appears

- If the toolbar is not displayed, click View > Toolbar. 1
- 2 Right-click the toolbar • click **Properties**.
- 3 Click the Show tab.
- 4 Choose how you want the toolbar to appear ► click **OK**.

Customizing Your Toolhar

- 1 If the toolbar is not displayed, click View > Toolbar.
- 2 Right-click the toolbar ▶ click **Properties**.
- 3 Click the **Show** tab.
- To remove or show the display settings drop-down list, deselect or select the Show Display Settings Drop-Down List check box.
- 5 Click the Customize tab.
- To add a button, click a category from the Categories list box ▶ click a button in the Controls box ▶ click Add Button.

Categories are menu titles in the Main Window. The buttons in the Controls box correspond to features found under the menu title. For example, the buttons for the File category are actions under the File menu (opening views, printing, saving, and so on).

- To remove a button, drag it off the toolbar.
- To change the order of a button on a toolbar, drag it to where you want it to display.
- To add or remove space between buttons, drag one button away from or toward the other button.

Tips

- When you drag buttons off the toolbar and move buttons around, the Toolbar Properties dialog box must be open.
- Toolbars change depending on the view you are in. To customize a toolbar, you must be in the view displaying that toolbar.
- You can also add buttons by dragging them from the Controls box onto the toolbar.
- If you want to view a description of a button, select the button in the Controls box ▶ read the button's description in the Description
- You can choose if toolbars display with pictures only or with both pictures and text. You can also choose to display your buttons in one row only or in multiple rows, depending on the number of buttons.

Customizing Your Library Settings

GroupWise lets you customize settings for the libraries in which you store and create documents. You can specify a default library, default sharing rights, default document properties layout (such as the order and size of fields), and default values for document properties. You can also specify whether you want to use the short or long form of the property sheet. The library and property settings you specify only affect your library setup. You cannot modify other users' settings.

Default Library

You can change the default library. When you create, import, or copy a document in GroupWise, it is saved in the default library, unless you specify a different library. In addition, Find searches for documents in the default library first. See Managing Your Documents in GroupWise under Creating and Working with Documents.

Default Property Values

You can specify default values for the document property fields that can be edited. The default values are used when you create a new document or import a document into the selected library. If no default values have been specified for author and document type, GroupWise uses the creator's name as the author and Document as the document type. See Managing Your Documents in *GroupWise* under *Creating and Working with Documents.*

Default Sharing Rights

If you usually share your documents with the same users or groups, you can specify default sharing rights for all the documents you create. Once you've specified default sharing rights, GroupWise applies these rights to each document you create or import into the selected library. See Managing Your Documents in GroupWise under Creating and Working with Documents.

Document Tab Configuration

You can customize the display of the Document tab in Properties. The Document tab appears each time you create, import, copy, or select Properties for a document. You can specify which fields you want to display on the Document tab. In addition, you can specify the number of lines in each field, the field's order on the dialog box, and you can insert blank lines and separators on the dialog box.

Document Property Sheets

When you create a new document or a new version of a document, GroupWise prompts you to specify document properties. You can specify whether you want GroupWise to prompt you for the document subject only or for all the document properties. See Managing Your Documents in GroupWise under Creating and Working with Documents.

Document Management Integration with Other Applications

If you are using integrated applications, such as WordPerfect or Microsoft Word, you can specify whether you want GroupWise Library features integrated with the application's Save and Open features. To use the integration, you must have installed Integrations during GroupWise Setup. If you didn't install Integrations, you can run Setup again to install them now. See Managing Your Documents in *GroupWise* under *Creating and Working with Documents.*

Setting the Default Library

You can change the default library. When you create, import, or copy a document in GroupWise, it is saved in the default library, unless you specify a different library. In addition, Find searches for documents in the default library first.

1 Click Tools ▶ Options ▶ double-click Documents. Click the library you want to use as a default.



Click Set Default ▶ OK.

Using Startup Options

GroupWise has optional commands that you can use when you start the program. Some of these options are for your convenience, while others are necessary to run GroupWise on your particular hardware. You can run startup options by specifying them after the command line in the target for your GroupWise shortcut.

GroupWise Startup Options This Startup Option	Does This
/@u-?	Displays a login dialog box whenever you open GroupWise, allowing you to supply any necessary login information.
/@u-USER ID	Lets you use your GroupWise user ID to open GroupWise as yourself on another user's computer. The other user remains logged on to the network.
/bl	Prevents the GroupWise splash screen from being displayed when you enter the program.
lc	Checks for unopened items. If there are unopened items, GroupWise opens as usual. Otherwise, GroupWise does not start.

This Startup Option	Does This
/cm	Checks for unopened items. If there are unopened items, GroupWise opens minimized and a beep sounds. Otherwise, GroupWise does not start.
/ipa- <ip address=""></ip>	Lets you specify the IP address. Type the address in place of <ip address="">.</ip>
/ipp-X	Lets you specify the IP port. Type the port number in place of X.
/l-XX	Applies only if you have two or more language versions or language modules. This option instructs GroupWise to override the default environment language (under General Environment in Options) with the language specified by the language code (XX). The language codes are listed below.
/la- <network id=""></network>	Lets you log on to another user's computer using your network ID. The other user remains logged on to the network. Type your network ID in place of <network id="">.</network>
/nu	Turns off AutoUpdate. If this option is selected, click View ► Refresh whenever you want to update the display with the items currently in your Mailbox.
/ph-PATHNAME	Lets you specify the path to the post office.
/ps-PATH TO REMOTE DATABASE	Opens GroupWise in Remote mode. This startup option can be used in the Target box only.

GroupWise Language Codes

The following table lists the language codes used by all Novell® products. GroupWise may not yet be available in some of the listed languages. For current information, contact your local reseller.

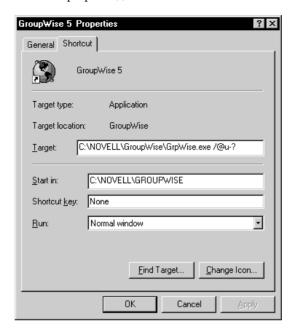
Language	Language Code
Afrikaans	AF
Arabic	AR
Catalan	CA
Croatian	HR
Czechoslovakian	CS
Danish	DK
Dutch	NL
English-Australia	OZ

Language	Language Code
English-Canada	CE
English-United Kingdom	UK
English-United States	US
Finnish	SU
French-Canada	CF
French-France	FR
Galician	GA
German-Germany	DE
German-Switzerland	SD
Greek	GR
Hebrew	HE
Hungarian	MA
Icelandic	IS
Italian	IT
Japanese	NI
Norwegian	NO
Polish	PL
Portuguese-Brazil	BR
Portuguese-Portugal	PO
Russian	RU
Slovak	SL
Spanish	ES
Swedish	SV
Turkish	TR
Ukrainian	YK

Using a GroupWise Startup Option

- Right-click the **GroupWise** icon on the desktop click **Properties**.
- Click the **Shortcut** tab. 2

3 In the Target box, after the GroupWise executable, type a space ▶ type the startup option(s) ▶ click OK.



4 Restart GroupWise.

Tips

• In the example above, the option /@u-? is used to display a login dialog box a user can supply with login information whenever he or she opens GroupWise. This option is useful when two or more users share a workstation but have separate GroupWise Mailboxes.

Using GroupWise Desktop

Using GroupWise Desktop

Use GroupWise® Desktop (GW Desktop) to access your appointments, reminder notes, and tasks quickly without having to open the GroupWise Client, thus freeing up system resources for other uses. GW Desktop displays your Calendar as well as the GroupWise Marquee (GW Marquee), which runs across the bottom of the window. GW Marquee displays the most recent information arriving in your Mailbox, and can also be run independently of GW Desktop.

Use GW Desktop if you spend a lot of time in GroupWise, but do not like to interrupt what you're currently doing to view your appointments, tasks, or reminder notes.

From GW Desktop, you can perform most of the actions possible from the GroupWise Client on your appointments, tasks, reminder notes, and messages. You can read items, accept or decline them, delete them, mark them private, move them to other dates, and mark your tasks completed.

When you send a message or schedule an appointment from GW Desktop, the GroupWise Client opens, allowing you to finish filling out the message or appointment.

Actions You Can Complete from GW Desktop

You can read incoming items in your GroupWise Desktop Calendar or Day Schedule view, or GW Marquee. Posted appointments, tasks, and reminder notes appear in your GW Desktop Calendar and GW Marquee. Once accepted, they appear in your Calendar only. Once you have read an item, it appears as Read in the sender's status Properties.

Alarms are set by default for all appointments, but you can remove an alarm if you want. You can also move items to a different date.

Reading Items

- 1 In GW Marquee, place the mouse pointer over the item's title.
- If the item is a message, the message text appears. If the item is an appointment, task, or reminder note, the Subject, Time, Date, Place, From, and To boxes are shown.



When you are finished, move the pointer outside of the pop-up window to close the message.

Right-click in the message information area above the message text > click Delete.

Accepting or Declining Items

- 1 From the GW Desktop Calendar or Day Schedule view, right-click the appointment, task, or reminder note.
- Click Accept or Decline.



- If the item is an Auto-Date item, click This Instance or All Instances.
- If the item is an appointment you accepted, right-click the appointment again ► click Show As ► select a level of availability.
- If you do not want an alarm set for this item, click **Remove Alarm**.

Tips

- Unaccepted or undeclined items are in italics. When they are accepted, the text displays normally.
- Free, Tentative, Busy, and Out of Office are Show Appointment As types or levels of availability that affect the way the appointment is displayed in Busy Search and in your Calendar.

Moving Items to a New Date

- From the GW Desktop, double-click the day that displays the item you want to move.
- Drag the Day Schedule view so that you can see your GW Desktop Calendar ▶ move to the month containing the date you want to move the item to. If

- the date is beyond the current month, click the month or year title above the current month to pick a new month or year.
- From a Day Schedule view, drag the appointment, task, or reminder note to the new date in the GW Desktop Calendar.

Deleting Items

- In the GW Desktop Calendar, right-click the item you want to delete. 1
- 2 Click Delete.
- If the item is an auto-date item, click This Instance or All Instances.

Marking Tasks Completed

- Click the day that displays the task. Unmarked tasks display on the current day, and display in red.
- 2 Select the check box next to the task.

Tips

- When you mark a task Completed, a check mark appears in the
- To unmark a Completed task, deselect the check box next to the
- For more information, see Marking Tasks Completed under Sending and Receiving Items.

Marking Items Private

Right-click an item • click Mark Private.

Tips

For more information, see Marking an Item Private under Giving Other People Access to Your Mailbox.

Setting Alarms for Items

In the GW Desktop Calendar or Day Schedule view, right-click an appointment.

Click Set Alarm.

Tips

- Alarms are set by default for appointments. To remove the alarm, right-click the appointment ▶ click Remove Alarm.
- The alarm will sound the number of minutes before the appointment you specify in GroupWise Date & Time Options.
- Notify must be running for the alarm to sound.
- If Set Alarm is not visible when you right-click the appointment, make sure that the appointment time hasn't already passed.
- In GroupWise Date & Time Options, you can choose to automatically set an alarm each time you accept an appointment.
- For more information, see Setting Alarms for Calendar Items.

Sending a Mail **Message from GW** Desktop

- In GW Desktop, click on the toolbar.
- In the To box, type a username press Enter. Repeat for additional users.
- To select usernames from a list, click Address by double-click each user by click **OK**.
- Type a subject.
- Type a message.
- Click Send.

When you click on the toolbar, the GroupWise Client opens, taking you directly to a mail message view.

Scheduling an Appointment from GW Desktop

- In GW Desktop, click on the toolbar.
- In the To, CC, and BC boxes, type the names of the people you want to invite. In addition, include any resource IDs in the To box. If you do not know a resource ID, click Address.
- Type the place description in the Place box.
- Specify the start date, start time, and duration.
- Type a subject and message.

Click Send.

Tips

- If you want to make sure the people and resources for the meeting are available, you can do a busy search. See Checking When Everyone *Is Available* under *Scheduling Appointments*.
- Duration can be in minutes, hours, or days. If you are scheduling a three-day conference, you can schedule one appointment with a duration of three days to cover the entire period.

Opening GroupWise from GW Desktop

1 Click on the toolbar.

Tips

This opens the GroupWise Client, from which you have access to all GroupWise features.

Viewing Your Folder List from GW Desktop

- Click on the toolbar.
- 2 Click + to expand or - to contract the Folder List.
- 3 Click a folder to see the items in it.
- To read an item, double-click it.

Tips

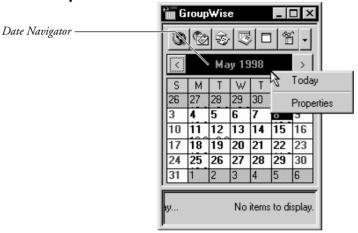
Double-clicking an item opens the GroupWise Client, from which you can read the item.

Using Date Navigator

Use Date Navigator to select the month or day you want to view. Date Navigator is a tool that lets you move more freely between dates in the GW Desktop Calendar or Day Schedule view. It appears as a title bar listing the month and year at the top of these two views, and includes the day if you are in the Day Schedule view.

Viewing Date Navigator General Properties

Right-click Date Navigator.



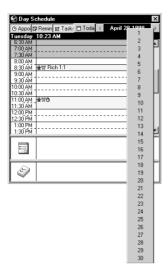
Click Properties.

Tips

The Date Navigator general properties are not changeable.

Changing Dates Using Date Navigator

1 To change days in the Day Schedule view, click the date number (for example, click 25 in the date 25 October 1998) ► click a day.



- 2 To change months, click the current month name in the GW Desktop Calendar or the Day Schedule view ► click a month.
- **3** To change years, click the current year in the GW Desktop Calendar or the Day Schedule view ► click a year.

Tips

- The date number is only visible from the Day Schedule view.
- You can also use the right- and left-arrows to change months in a GroupWise view or to change days in the Day Schedule view.

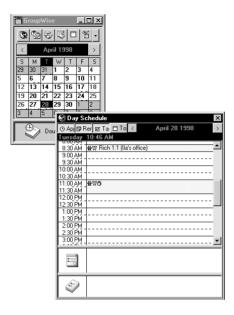
Viewing Your GW Desktop Calendar

When you open GW Desktop, you see a Calendar. From the Calendar, you can view your reminder notes, tasks, and appointments. You can also view all your items for a given day.

Viewing Today's Schedule in GW Desktop

- 1 Click
- To change which items are displayed, click the down-arrow on the button ► click Show Appointments, Show Notes, or Show Tasks.

To display an expanded view, double-click the day in GW Desktop Calendar.



Tips

- A check mark next to Show Appointments, Show Notes, or Show Tasks means that the checked item is displayed below the Calendar.
- To go to a different day, click the day in GW Desktop Calendar.

Viewing a New Date in **GW Desktop**

1 If the new date is in the same month as the current date, click the new date.

If the date is in a different month or year, click the Month or Year in Date Navigator ▶ select the month or year ▶ click the new date.

Tips

- If the month calendar is visible, you can view a day's items at the bottom of the view by clicking the day you want to view.
- To display an expanded view of a day, double-click the day in the Calendar.

Viewing Another User's Calendar in GW Desktop

- 1 Right-click any view (for example, the Day Schedule view) ► click Proxy.
- 2 Click the name of the person whose Mailbox you want to access.
- When you have finished your work in the other person's Mailbox, right-click the view ► click your own name to return to your Mailbox.

Tips

- Before you can act as a proxy for someone, that person must give you proxy rights in his or her Access List in Options in GroupWise. Before you can click that person's name in your Proxy pop-up list, you must add it to your Proxy List in GroupWise.
- You may have limited access to the other user's Mailbox, depending on the rights the user assigned you in the Access List in Options in GroupWise.
- You can act as a proxy for any user on your post office who gives you rights. If you want to act as a proxy for a user on another post office, client/server must be enabled on the destination post office.
- For more information on Proxy, see Giving Other People Access to Your Mailbox.

Using GroupWise Marquee

Use GroupWise Marquee (GW Marquee) to display the most recent information arriving in your Mailbox. GW Marquee scrolls information about the items you specify. You can customize GW Marquee to display only the items you want to see. If you rest your pointer on an item, additional information about the item appears. You can open GW Marquee independently or view it across the bottom of the GW Desktop Calendar. For a list of icons, see *Reading Items You Receive* under *Managing Sent Items*.

Displaying New Items in GW Marquee

Use Refresh to display new items in GroupWise Marquee. For example, if a mail message has been delivered to you, but it hasn't yet appeared in GW Marquee, Refresh displays the pending message.

You can change the default refresh interval in the Options tab under GW Marquee Properties. See *Selecting What GW Marquee Displays* below.

1 Right-click GW Marquee ► click Refresh.

Using the GW Desktop Item List

The Item List in Desktop or Marquee is a list of your unopened items. You can open unread items from the Item List by double-clicking them. The Item List is divided into columns. Each column displays information about the items in the list. For example, columns may display the subject of items, the date, and so

forth. You can customize the column display by changing column widths, by adding or deleting columns, and by changing the order of columns.

Add Columns to the GW Desktop Item List

- Right-click GW Marquee ► click Item List.
- 2 Right-click a column heading ▶ click More Columns ▶ a column in the Available Columns list box > click Add > OK.

Tips

You can select multiple columns to add by pressing Ctrl while you click columns.

Change the Order of the Columns in GW Desktop

- Right-click GW Marquee click Item List.
- Right-click a column heading ▶ click More Columns.
- Click a column name in the Selected Columns box.
- Click Down or Up.
- Click OK.

Remove Columns from the GW Desktop Item List

- Right-click GW Marquee click Item List.
- Right-click a column heading ▶ click More Columns.
- Click a column in the Selected Columns box ▶ click **Remove**.

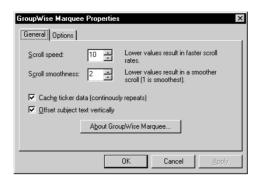
Resize Columns in the GW Desktop Item List

- Right-click GW Marquee ► click Item List.
- Position the mouse pointer over the edge of a column heading until a twoheaded arrow appears • drag to resize the column.

Changing How GW Marquee Displays Your Items

- Right-click GW Marquee ► click Properties.
- 2 If necessary, click the General tab.

Set the scroll speed and scroll smoothness.



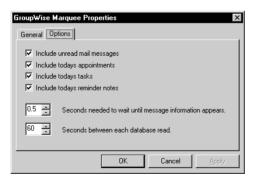
- To stop GW Marquee from scrolling, deselect the Cache Ticker Data check
- To offset the subject of the item from the rest of the item's information, select Offset Subject Text Vertically.
- 6 To view the version number and other GW Marquee information, click About GroupWise Marquee.
- 7 Click **OK** to save your changes and close the dialog box.

or

Click Apply to save your changes and keep the dialog box open.

Selecting What GW Marquee Displays

- 1 Right-click GW Marquee • click Properties.
- Click the **Options** tab.



- Select the items you want to include in GW Marquee.
- Select the number of seconds you want GW Marquee to delay in displaying the item's information.

This is the amount of time from the instant you place the pointer over the item until the item's information displays in a window.

- Select the interval between times GW Desktop reads the database for new items.
- Click **OK** to save your changes and close the dialog box.

or

Click **Apply** to save your changes and keep the dialog box open.

Setting GW Marquee and Date Navigator **Font Properties**

- 1 Right-click the Date Navigator or GW Marquee • click Properties.
- 2 Click the **Fonts** tab.
- Click a font and a font style. 3
- Click a size.
- Click Strikeout or Underline if you want.
- Click **OK** to save your changes and close the dialog box.

or

Click **Apply** to save your changes and keep the dialog box open.

Tips

You can see how the new font, font style, or size looks in the Sample box.

Setting GW Marguee Color Properties

- 1 Right-click GW Marquee • click Properties.
- Click the Colors tab. 2
- Select a property name from the Property Name drop-down list > click the color you want to associate with the property name.
- Select a system color ▶ click a color you want to associate with the system color.
- Click **OK** to save your changes and close the dialog box.

or

Click **Apply** to save your changes and keep the dialog box open.

Tips

The selected color for each property has a sculptured appearance, like this:

Using GroupWise Imaging

Using Imaging: An Overview

The ability to convert paper-based information into a usable electronic format can free up your time and make you more productive. GroupWise® Imaging is an application which allows you to convert such information (for example, photographs, line drawings, and text documents) into digitized scanned images that can be sized and moved as well as annotated, e-mailed, faxed, or printed.

Depending on the file format, image files may contain one or more images and can be black and white, grayscale, or color. When loading and saving image files, system performance will vary according to the hardware being used and the image size.

Supported File Types

Supported file types can be displayed, manipulated, and saved as either the same file type or a similar one. The following file types are currently supported.

File	Description
EVY	Envoy [™] image
BMP	Bitmap
JPG	Joint Photographic Experts Group
AWD	Fax
DCX	PC Paintbrush
PCX	PC Paintbrush
XIF	Xerox® Image Format
TIF	Tagged Image File Format

Tips

If you want to convert an image to a different file type, click File > Save As ► click a file type from the Save As Type drop-down list.

Using Annotations

Annotations are electronic versions of the marks commonly used on paper-based documents, for example, highlights, rubber stamps, and text notes. However, because GroupWise Imaging annotations are digitized, they make adding, moving, and deleting editing marks much easier. Also, the attributes of digitized annotations (such as color, size, text, and visibility) can be more readily modified than paper-based.

Annotation Icon	Tool Name
2	Annotation Selection
	Straight Line
24	Freehand Line
	Hollow Rectangle
△	Text from a File
	Filled Rectangle
E22	Highlighting Pen
abl	Text
	Attach-a-Note
1	Rubber Stamp

Displaying the Annotation Toolbar

1 Click on the main toolbar.



Tips

- You can also click **View Show Annotation Toolbar**. The annotation toolbar can only be displayed if the file type supports annotations.

Selecting an Existing Annotation

1 Click on the main toolbar.

2 Click on the annotation toolbar.



3 Click an annotation.

Tips

- Any annotation you wish to move, modify, or delete must first be selected using this tool. Once the annotation is selected, it is redisplayed with handles. To resize the annotation, click a handle and drag the pointer.
- The annotation toolbar can only be displayed if the file type supports annotations.

Scanning

Scanning enables you to capture paper-based data as electronic images. A scanner is connected to a PC or network and is controlled by an application program. The application program communicates with the scanner through an interface called the scanner data source (driver), which is usually supplied by the scanner's manufacturer. The most common scanner data source is TWAIN. TWAIN is an industry-standard specification for image capture and is supported by most scanners.

Selecting a Scanner

- Click Tools ▶ Options. 1
- 2 Click Scanner.
- 3 Click Select Scanner ▶ scanner name ▶ OK.
- Click OK.

Tips

If you are using the Enhanced Version of Imaging, click ISIS or TWAIN after you select the scanner.

Scanning an Image

- Click Scan ▶ New File. 1
- 2 Click Scan.
- 3 Click OK.

Tips

- No scan features will be enabled until a scanner is selected.
- If your scanner uses a TWAIN driver, you may have to wait until you are prompted to insert the page.

Opening an Existing Image

- Click on the main toolbar.
- Click the folder you want to look in.
- Click the filename.
- Click Open.

You can also open a registered file by right-clicking the file, then clicking Open.

E-mailing an Image

GroupWise Imaging lets you e-mail images to other users to view, to add changes and annotations to, and so forth.

- 1 Click on the main toolbar.
- **2** Type your password. (A password will only be required if one was assigned during the creation of the Mailbox.)
- 3 Click OK.
- 4 In the To box, type the names of the people you want to send the image to. If you need to look up names in the Address Book, click Address.
- **5** Click the **Subject** box ▶ type a subject.
- **6** Click the **Message** box ▶ type your message.
- 7 Click Send.

Tips

- If the Send tool button is disabled, Windows® messaging has not been installed on your workstation.
- You can also e-mail a registered file by right-clicking the file, then clicking Send.

Sending and Receiving Workflow Items

Using Workflow: An Overview

A workflow is a series of steps or tasks done by several people to accomplish a goal. Typically, a workflow contains an attached file which recipients can open in its source application. For example, rather than printing, copying, and delivering a file for review or approval, you can route it electronically as part of a workflow.

IMPORTANT: Workflow is an optional GroupWise component that you install during Setup. If you didn't install Workflow during Setup, you won't have access to any of the Workflow features described in this section.

A workflow recipient can be anyone in the Address Book. You can send a broadcast workflow to all recipients at once. You can also send a sequential workflow to recipients in the order that you selected them from the Address Book, depending on how you want the work to be completed.

A workflow can have one attachment. An attachment can be a file or a link. In sequential workflows, changes made by recipients to attached files can be seen by the next recipients. Each recipient receives a work item in the Mailbox. When a recipient opens the work item, an attached file can be opened or edited. The four types of attachments are explained in the table below.

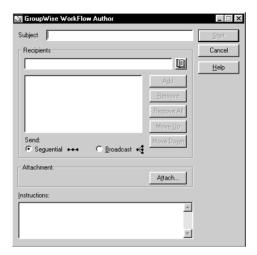
Attachment Type	Description
File (sent with workflow)	A copy of a file from your local or network drive. Each workflow recipient receives a separate copy of the file.
File (link)	A link to a file stored on a network or shared location. Each workflow recipient opens the same file from the linked location. Use the \\SERVER\PATH\FILENAME format to specify a file link, such as \\NETWORK\DATA\RESUME.DOC.
DMS document	A link to a document in your GroupWise® Library. Workflow recipients can check out, check in, view, or open an attached document reference in the application that was used to create it, depending on the security privileges given to the recipients.
Internet address	A link to an Internet location using a uniform resource locator, such as http://www.novell.com/products.html. When workflow recipients open an Internet attachment, their Internet browser opens to the attached Internet address.

As the workflow progresses, you can use your Mailbox or WorkFlow Central to check the workflow status. The status is updated each time a recipient completes a work item. When all work items are complete, you receive a workflow report, which displays the results of the workflow.

Creating a Workflow

As a workflow originator, you decide what kind of workflow you want to send (broadcast or sequential). You should include instructions so recipients know what they should do. To check the progress of a workflow you sent, see *Tracking a Workflow's Status* later in this section.

1 In GroupWise, click File ➤ New ➤ WorkFlow.



- **2** Type a subject to identify the workflow.
- 4 To send the workflow to recipients one after another, make sure Sequential is selected.

or

To send to all recipients at once, click Broadcast.

To attach a file, click **Attach** ▶ click the **Type** drop-down list ▶ an attachment type ▶ **Browse** ▶ click the file to attach ▶ **Open** ▶ **OK**.

In the **Attachment** box, type the filename, path, or Internet address ► click **OK**.

6 Type instructions for the recipients.

Click Start. 7

Tips

- To add a recipient to a workflow, you can type the e-mail address in the Recipients box • press Enter.
- To change the recipient order in a sequential workflow, click a name ▶ Move Up or Move Down.
- To remove a recipient from the list, click a name > Remove. To remove all recipients, click Remove All.

Participating in a Workflow

As a workflow participant, you receive a work item which you must complete for the workflow to continue. You can open work items in your Mailbox or WorkFlow Central.

A work item should contain instructions from the originator of the workflow explaining what to do. Typically, a work item also contains an attached file which you can open in its source application. Status information shows the workflow type (sequential or broadcast) and recipient information.

- In your Mailbox or WorkFlow Central, open a work item.
- 2 Read the instructions.
- 3 Type your comments.
- To open the attachment or go to the attached Internet address, click **Open**.
 - To open a document from your GroupWise Library, click Check Out. When you're done with the document, click Check In.
- To display a recipient's comments, click the **Status** tab click a name in the Name list.
- To send a mail message to another recipient, click the **Status** tab ▶ a name ▶ Reply.
- To complete the work item and send it to the next recipient, click **Done**.

Tips

- When you open an Internet attachment, your Internet browser opens to the attached Internet address.
- To close the work item without completing it, click **Close**. The workflow will not continue to the next recipient until you open the work item again and click **Done**.
- To send a mail message to the person who started the workflow, click **Reply**. This is useful when you need more information to complete the work item.

Viewing Status Information from a Work Item

- 1 Click the Status tab.
- **2** To display a recipient's comments, click a name in the Name list.
- **3** To send a mail message to a recipient, click a name ► Reply.

Tracking a Workflow's Status

A workflow status message shows information about a workflow you have sent. It is updated each time a recipient completes a work item. You can open status messages in your Mailbox or WorkFlow Central.

A status message lists the recipients, their comments, and dates for completed work items. A check indicates the recipient has completed his or her work item.

- 1 In your Mailbox or WorkFlow Central, double-click a status message.
- **2** To display a recipient's comments, click a name in the Name list.
- **3** To send a mail message to a recipient, click a name ► Reply.
- 4 Click Close.

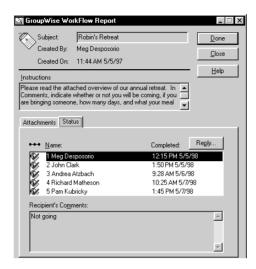
Viewing a Workflow Report

If you sent a sequential workflow, a workflow report arrives in your Mailbox after the last work item is completed. If you sent a broadcast workflow, you receive a report after the first recipient completes a work item. The report is updated each time another recipient completes a work item. You can open reports in your Mailbox or WorkFlow Central.

A report shows the date that each work item was completed and the recipients' comments. You can open the attached file or reply to a recipient from a report.

- 1 In your Mailbox or WorkFlow Central, double-click a report.
- 2 To open or edit the attached file, click Open.

3 To display a recipient's comments, click the **Status** tab ▶ click a name in the Name list.



- **4** To send a mail message to another recipient, click the **Status** tab ▶ a name ▶ **Reply**.
- 5 Click Done.

Viewing, Managing, and Deleting Your Workflows

WorkFlow Central keeps track of the workflows you create and participate in. Use WorkFlow Central to view, open, save, or delete work items, status messages, and reports.

WorkFlow Central gets information directly from the Data folder, the location where workflow message information is stored, typically C:\GWWF\DATA. If you delete a workflow message in your Mailbox, you can still open it in WorkFlow Central. If you delete a workflow message in WorkFlow Central, it is deleted in both WorkFlow Central and your Mailbox.

When a new workflow message is delivered to your Mailbox, a WorkFlow Central icon appears on the Windows® taskbar near the clock. Double-click the icon to start WorkFlow Central or display it on top of other windows. After you open the message, the icon disappears.

- 1 From your desktop, open WorkFlow Central.
 or
 In GroupWise, click Tools > WorkFlow Central.
- 2 In WorkFlow Central, double-click a work item, status message, or report.

To delete an item, click it ▶ Remove.

Tips

- When deleting items, a confirmation message appears if the item has not been completed.
- To delete multiple items, Ctrl+click each item ► click Remove.

 To delete a range of items, click the first item ► Shift+click the last item ► click Remove.

Index

Index

A	Address filters, searching for addresses	automatically 87
accept items within GW Desktop 283	109	specifying default folder 268
Accepting	Address information, changing display	unarchiving items 87
appointments, notes, and tasks 51	121	using 86
resource requests 102	Addresses	viewing 87
Access List	exporting 116	Attach-a-note annotations 296
editing 96	importing 115	Attaching
giving others rights 96	moving 115	document references 27
Actions for rules 90	searching for 108	files 26
Active Desktop (GroupWise), concepts	alarm, setting in GW Desktop 284	sound files 28
282	Alarms 75	Attachments
Activity document, viewing 179	Notify 83	deleting 27
Adding	specifying 271	opening 28
names to personal address books 127	Annotation toolbar, displaying 297	printing 89
users to Proxy list 98	Annotations	saving 100
Address Book	Imaging 296	viewing 28
importing non-Novell address books	selecting existing 297	viewing in QuickViewer 33
into 116	Applications	workflow 302
setting properties of individual books	documents, saving 191	Authored folder 167
within 132	integrating 221	Auto-Date 54
sharing with another user 133	integrating with GroupWise 220	Auto-dates 54-56, 58
using LDAP with 111	non-integrated, using 223	accepting 51
Address Books	using non-integrated with GroupWise	declining 51
addressing items 122	223	examples 54-56
changing display 118	appointment, sending from GW	formula functions and operators 58
closing 118	Desktop 285	automatically spell-check 272
column order, changing 121	Appointments	7 1
concepts 108	addressing 122	В
copying from other users 115	canceling 43	/bl, startup option 277
copying names to personal 130	changing to other item types 37	Backup, replacing document with 227
creating personal 127	checking status 31	Blind copy (bc) 22
deleting 128	confirming delivery 29	Blocking out time 44, 45
editing 129	delegating 39	Bolded items, in Mailbox 9
exporting addresses 116	in GW Desktop 282	Broadcast workflow 303
frequent contacts 124	personal 44, 45	Browser window see Main Window
importing addresses 115	printing 68, 70	Busy 44
moving 115	reading 66	Busy Search 45
opening and closing 118	receiving 51	owning resources 102
predefined filters 126	recipients across time zones 52	using in Remote 248
removing names from personal 131	recurring 54, 57, 58	Button Bar <i>see</i> Toolbar
retrieving in Remote 247	reminding yourself 75	
selecting addresses 122	rescheduling 43	С
sending mail from 123	resending 30	/c, startup option 277
specifying displayed columns 119	saving 66	/cm, startup option 278
synchronizing entries 131	scheduling 42, 45	Calendar 74
user-created 127	scheduling recurring 54	appointment time intervals 64
using in Remote 249	setting alarms 75	available printed formats 68
using to send items 122	spell-checking 24	changing items 38
viewing group information 114	viewing 63	changing views 73
Address columns, displaying 119	Archive	concepts 63
ridaress cordinins, displaying 11)		concepto os

custom calendar views 64	color properties, setting for GW	document references 165
filtering 146	Marquee 293	document versions 194
first day of week 74	column order, changing in GW	documents 162
graphical display 64	Marquee 291	folders 79
icons 65	columns	groups 113
items, reading 66	adding to Item List in GW Marquee	passwords 273
overriding print settings 70	291	personal address books 127
printing 68	adding to Mailbox 13	resource rules 103
printing the schedules of multiple	changing order 13, 121	rules 90, 93
users 72	displaying 119	TCP/IP Remote connections 256
printing with current date and time	removing 14	workflows 303
70	removing from GW Marquee Item	Current version, documents 194
saving items in 66	List 291	Custom Import 171
show appointment as 64	resizing 13	
textual display 64	resizing in GW Marquee Item List	D
viewing 63	291	Database, Remote 19
viewing another date 74	sorting 13	Date 74
viewing in GW Desktop 288	Company information, viewing 134	moving item to new in GW Desktop
viewing Mailbox as 12	complete Task in GW Desktop 284	283
viewing the schedules of multiple users	Conditions, searching for addresses 109	Date Navigator
66	Conference calls 262	changing dates with 288
views 64	Conference rooms, scheduling 102	concepts 287
week numbers 64	Connections Connections	setting font properties for 293
Calendar folder 63	configuring for Remote 252	viewing general properties of 287
Calling	modem 253, 254	Day
Conversation Place 261	network 254, 256	calendar 73
the sender of items 260	Remote types 230	changing first in week 74
Canceling appointments 43	TCP/IP in Remote 256	Days
Carbon copy (cc) 22	Contacts, frequent 124	of the month, auto-date 54
change dates with Date Navigator 288	Context-sensitive help 4	of the week, auto-date 54
Changing Changing	Conversation Place 260	to search 45
item priority 269	calling someone 261	decline items within GW Desktop 283
item types 37	conference calls 262	Declining Declining
passwords 273	dialing recent numbers 262	appointments, tasks, and notes 51
check off Task in GW Desktop 284	hanging up 262	resource requests 102
Checked-out	merging calls 263	Default library folder 167
document status 180	placing calls on hold 261	Default library, setting 276
documents, updating 183	specifying location 263	Defaults
documents, viewing 182	starting 261	document properties 161
Checking in	transferring calls 262	library 160
documents 183	Cool Solutions, FAQ 5	Defaults, alarms 75
methods of 184	Cool Solutions magazine 5	define Name Completion search order
new versions of documents 186	Quick Start Cards, downloading 6	110
unchanged documents 185	sending questions to 5	Delaying delivery of items 266
Checking out	Copying	Delegating items 39
documents 180	documents 189	delete items within GW Desktop 284
multiple documents 181	other users' address books 115	Deleting
Clearing filters 147	Remote connections 257	appointments 43
Client/server 19	rules 94	attachments 27
clock icon 65	Create, document reference 140	documents 187
Closing address books 118	Creating	documents, specific versions 188
Codes, language 278	auto-dates 54, 57	filters 147
Cours, minguage 270	discussion threads 83	folders 79

items in Remote 251	copying 189	images, opening 299
Mailbox items 106	copying to another library 190	Exporting addresses 116
personal address books 128	creating 162	
Remote connections 257	creating references to 165	F
rules 94	default properties for 161	FAQ, reading in Cool Solutions 5
sent items 30	deleting 187	Fields for filters and rules 152
users from your Proxy list 99	echoing 218	File types, supported by Imaging 295
workflow messages 306	finding 140	Files
Delivery, delay 266	folder 8	attaching 26
Details, viewing items by 11	giving rights to versions 177	documents, saving as 191
Dial Sender	importing 169	link, workflow attachment 302
calling 260	integrating with applications 220	opening attached 28
using 260	limiting access 178	printing 89
Dialing recently used numbers 262	new versions 194	routing 302
Different calendar view 73	official versions, specifying 195	sent with workflow 302
Disabling, integrations 221	opening 193	sound, attaching 28
Disabling rules 95	opening multiple versions 193	viewing attached 28
Discussion threads	organizing 166	Filtering
creating 83	permission to modify rights 177	displaying or hiding items 144
viewing items by 11	references 160	fields 152
Disk Space Management, in Remote	Remote, opening in 193	system address book in Remote 249
251	replacing with a backup file 227	Filters 144
Display	retrieving in Remote 243	clearing 147
of items, changing 7	returning to the library 224	creating 144
selecting in GW Marquee 292	rights, all versions 176	deleting 147
Display settings drop-down list 7	saving 190	narrowing 148
display today's schedule in GW Desktop	sharing 174	operators 150
288	specifying properties of 160	predefined 126, 134
Displaying	storing in libraries 159	saving 147
address books 118	templates for 165	searching for addresses 109
address columns 119	versions 194	using existing 146
annotation toolbar 297	versions, deleting all 188	wildcard characters and switches 149
different address book information	who checked out, viewing 180	Find
118	Documents folder, number of references	advanced 141, 142
Displays, filtering 144	in 168	documents 140
DMS documents, workflow attachments	Downloading, items from Master	filtering 144
302	Mailbox 241	narrowing with operators 143
Document histories, viewing 179		Results folders 138
Document property sheets 276	E	saving results 138
Document references, attaching 27	E-mail images 300	searching with filters 109
Document tabs, configuration 276	Echoing, documents 218	specifying scope 137
Document types, deleting 187	Editing	Finding
Documents	Access List 96	addresses 108, 122
accessing when GroupWise is not	groups in address books 114	items 137
available 218	personal address books 127-129	text in items 144
activity, viewing 179	Remote connections 257	finish Task in GW Desktop 284
adding to Documents folder 168	rules 94	First day of week, specifying 74
checked-out 183	Emptying your Trash 105	Folder displays, creating 78
checking in 183	Enabling, integrations 222	Folder List
checking out 180	Enabling rules 95	icons in 8
checking out multiple 181	Events, triggering rules 92	using 78
checking status 180	Existing	viewing from GW Desktop 286
concepts 159	annotations, selecting 297	Folders

authored 167	integrating with applications 220	item 9
calendar 63	logging in to 17	Mailbox 32
creating 79	opening from GW Desktop 286	Images, e-mailing 300
creating subfolders 78	overview 2	Imaging
customizing documents 168	printed calendar format 68	annotations 296
default library 167	starting 2	e-mailing images 300
defining properties 78	GroupWise Imaging, overview 295	opening images 299
deleting 79	GroupWise Library 159	overview 295
documents 8, 166	GW Desktop	scanning 298
linking items 80	accepting or declining items within	selecting scanners 299
moving items 80	283	supported file types 295
number of references in documents	concepts 282	Importing
folder 168	deleting items within 284	addresses 115
posting to shared folders 83	moving items to new date within 283	documents 169
renaming 78	opening GroupWise from 286	non-Novell address books 116
sharing 81, 82	reading items within 282	In Use status 239, 244
font properties, setting for GW Marquee	scheduling appointment within 285	Incoming items, reading in Calendar 60
and Date Navigator 293	sending mail within 285	Information, displaying different address
foreign address books, importing 116	viewing Calendar in 288	book 118
Formulas, auto-date functions and	viewing Folder List from 286	Installing
operators 58	viewing Item List within 290	GroupWise 2
forwarding items 37	viewing proxy's schedule in 290	Remote 233
Franklin Day Planners, coordinating	viewing today's schedule in 288	Integrating, applications with
with GroupWise 68	GW Marquee	GroupWise 221
Franklin Quest, printed calendar format	adding column to Item List 291	Integrating GroupWise with application
68	changing column order in Item List	221
Free 44	291	Integrations
Freehand line annotations 296	changing how displays items 291	turning off 221
Frequent Contacts 124	concepts 290	turning on 222
addressing items 124	refresh 290	Interface language, changing 270
using predefined filters 126	removing column from Item List 291	Internet
Frequent Contacts Address Book, setting	resizing columns in Item List 291	sending messages 22
	selecting what displays 292	workflow attachments 302
properties for 125 Functions, auto-date 58, 61	setting font properties for 293	Internet messages, retracting 31
Tunctions, auto-date 70, 01	setting font properties for 275	Item List
G	Н	filtering 144
Giving access to your Mailbox 96	Help, getting 2	viewing in GW Marquee 290 Items
Go to date 74	Hiding items using Filter 144	
Granting proxy rights 96	Highlighting pen annotations 296	addressing with frequent contacts 124
Group appointments, scheduling 42	History document, viewing 179 Hit the Road 232	changing type of 37
Group information		checking status 31
viewing 134	Hold, putting calls on 261	confirming delivery 29
viewing in address books 114	Holidays, scheduling 54	creating documents 165
Group items, changing to personal items	Hollow rectangle annotations 296	delaying delivery 266
39	Home Office, using GroupWise 230	delegating to others 39
Groups	HTML Messages, reading 40	deleting 106
addressing 112, 113	T	deleting in Remote 251
creating 113	I	displaying sent 29
editing 114	/ipa- <ip, 278<="" option="" startup="" td=""><td>documents 160</td></ip,>	documents 160
retrieving 114	/ipp-x, startup option 278	finding 137
searching for addresses 108	lcons	forwarding 37
selecting addresses 122	calendar 65	getting receipts 266
GroupWise	Folder List 8	HTML 40

marking unread 34	M	sending in GW Desktop 285
printing 88	mail, sending from GW Desktop 285	Messages
reading 32, 66	Mail Message	in GW Desktop 282
reading in QuickViewer 33	marking Private in GW Desktop 284	printing 88
replying to 35	sending in GW Desktop 285	reading in Calendar 66
resending 30	Mail messages	sending from Address Book 123
retracting 30	addressing 122	Modem, creating connections in Remot
retrieving in Remote 237	changing to other item types 37	254
routing 302	checking status 31	Modify rights 177
saving 100	confirming delivery 29	Month offset days 56
sending from Remote 239	forwarding 37	move items to new date in GW Desktop
spell-checking 24	including in reply 36	283
using address books to send 122	replying to 35	Moving
	resending 30	address books 115
L	routing 302	items in folders 80
/l-xx, startup option 278	sending 22	Multi-User, printed calendar format 68
/la- <network, 278<="" option="" startup="" td=""><td>sending from address books 123</td><td>Multi-User List 67</td></network,>	sending from address books 123	Multi-User List 67
Languages	sending from Remote 239	Multiple Users
changing interface 270	spell-checking 24	printing the schedules of 72
codes 278	Mailbox	setting up Remote on a shared
Laptop, using GroupWise on 230	adding columns 13	computer 234
Launching applications with alarms 75	bolded items 9	viewing the schedules of 66
LDAP	changing column order 13	Mutiple documents, checking out 181
modifying provider properties of 111	changing items 38	
using in the Address Book 111	deleting documents 188	N
Libraries	giving others proxy access 96	/nu, startup option 278
customizing settings 275	icons 9, 32	Name Completion concepts 108
default 160	logging in 17	Name Completion search order, defining
documents, copying to 190	logging in from another workstation	110
documents, saving outside 191	17	Names, adding to personal address book
linking documents to workflows 302	passwords in Remote 237	127
returning documents to 224	removing columns 14	Network post office 20
setting default 276	resizing columns 13	New address books, creating 127
storing documents 159	sorting columns 13	Non-Integrated applications 223
Lightweight Directory Access Protocol,	updating Remote 235	Notes
using in Address Book 111	viewing options 11	accepting 51
Linking, items to folders 80	Main Window concepts 7	addressing 122
list of messages, viewing in GW Marquee	Manage, disk space 251	changing to other item types 37
290	Managing other's Mailboxes 97	declining 51
Listing groups 112	Mark item Private in GW Desktop 284	personal 50
Location, specifying phone information	Marking completed tasks 49	printing 68, 70
263	Master Mailbox 230	recurring 54, 57, 58
Locking documents 178	retrieving items in Remote 241	saving 66
Logging in 17	Meetings	scheduling recurring 54
client/server 19	accepting 51	sending 50, 51
concepts 17	canceling 43	viewing 63
path to Remote database 19	declining 51	Notify
remembering passwords 18	recipients across time zones 52	getting proxy notification 85
to network post office 20	rescheduling 43	reading items from 84
	scheduling 42	running 83
	Merging telephone calls 263	setting options 84
	message	starting 84
	marking Private in GW Deskton 284	turning off 84

0	personal address book	setting GW Marquee 291
ODMA 220	setting properties of 132	specifying document 160
Official version 194, 195	sharing with another user 133	viewing Date Navigator 287
Offset days 55, 56	Personal address books	viewing for an address book 132
open GroupWise from GW Desktop	adding names to 127	Property values, default 275
286	concepts 127	Proxy 96
Opening	copying 115	editing the Access List 96
address books 118	copying names to 130	granting rights 96
attachments 28	creating 127	managing other's Mailboxes 97
documents 193	deleting 128	marking items private 99
documents, multiple versions 193	removing names from 131	printing a user's name on a printed
existing images 299	synchronizing entries 131	calendar 70
items in Calendar 66	Personal groups 112, 113	printing the schedules of multiple
Trash 104	editing 114	users 72
WorkFlow Central 306	Personal items	receiving rights 96
Operators	changing to group items 39	subscribing to proxy notification 85
auto-date 58	scheduling 42, 44, 45	viewing schedule in GW Desktop 290
filters and rules 150	Phone messages	viewing the schedules of multiple users
Find 143	addressing 122	66
Options	changing to other item types 37	Proxy List
alarms 271	sending 23	adding users 98
default Archive folder 268	Phone, using with GroupWise 260	deleting users 99
default views 270	POA 19	Public groups 112, 113
interface language 270	Post office 20	Tublic groups 112, 119
item priority 269	Post office agent 19	Q
Remote 236	Posted items, scheduling 42, 44, 45	Quick Import 170
replies for sent items 267	Posting to shared folders 83	QuickViewer, viewing attachments 33
	Predefined filters 134	QuickViewer, reading items 33
return receipts 266	concepts 134	Quick viewei, reading items 55
setting 266 Order, changing in columns 121	frequent contacts 126	R
Organizations, searching for addresses of	Preferences see Options	Range, auto-dates 54
108	Print	read items in GW Desktop 282
Out of Office 44	attached files 89	Reading
	calendar items 68	Calendar items 66
Overview, GroupWise Imaging 295	schedules 68	items later 34
Owning resources 102		Mailbox items 33
P	schedules of multiple users 72 Priorities	received items 32
	_	.
/ph-pathname, startup option 278	auto-date operators 58	Receipts, sent items 266
/ps-path to Remote database, startup	changing 269	Received items, displaying 7
option 278	private, marking item within GW	Received items, reading 32
padlock icon 65	Desktop 284	Receiving proxy rights 96
Participating in workflows 304	Private, marking items 99	Recipients, workflow 304
Passwords 17, 18, 272	Programs, launching with alarms 75	Recurring appointments 54
changing 273	Prompting for appointments 75	References
Mailbox 273	Properties	creating 165
removing 273	checking status of items 31	documents 160
Path	document, defaults for 161	refresh GW Marquee 290
to host 20	modifying LDAP provider 111	Regular appointments 54
to Remote database 19	printing 89	Remember password 18
Pending items, accepting or declining	setting an address book's 132	Reminder Notes
51 D. II. 270	setting color for GW Marquee 293	in GW Desktop 282
Pending requests 240	setting for Frequent Contacts book	printing 68, 70
Periodic scheduling, auto-dates 54	125	saving 66

scheduling recurring 54	names from address books 131	editing 94
sending 50	your password 273	enabling or disabling 95
viewing 63	removing items within GW Desktop	events 92
Reminders, alarms before appointments	284	fields 152
75	Renaming folders 78	limiting scope 94
Remote	Replies, requesting 267	resources 103
concepts 230	Replying	running manually 94
connecting at regular intervals 236,	including message text 36	Running
237	items in shared folders 36	Notify 83
connection types 230	received items 35	rules manually 94
connections 252	to workflow originator 304	
copying connections 257	Reports, workflow 305	S
creating modem connections 254	Requesting replies for sent items 267	Saving
creating network connections 256	Rescheduling 43	attachments 100
creating TCP/IP connections 256	Resending items 30	Calendar items 66
database 19	Reserving time 44, 45	documents 190
deleting connections 257	Reset document status, Reset 224	filters 147
deleting items 251	Resources	groups 113
deleting items in Mailbox 238	accepting and declining requests 102	Mailbox items 100
Disk Space Management 251	creating rules for 103	status information 102
documents, opening 193	notifications 103	unfinished items 102
editing connections 257	owning 102	usernames to address books 130
filtering system address book 249	searching for addresses 108	Scanners, selecting 299
limiting the items you retrieve 244	viewing information 134	Scanning, Imaging 298
Mailbox 230	viewing the availability of multiple	Schedule
marking a document as In Use 241,	resources 66	printing 68
244	Retracting items 30	recurring appointments 54
marking a document In Use 239, 244	Retrieve	viewing todays' schedule in GW
options 236	items in Remote at regular intervals	Desktop 288
retrieving documents 243	237	schedule appointment from GW
retrieving items received between	selected items 246	Desktop 285
specific days 246	Retrieving	Schedules
retrieving items since you last	documents 193	printing 68
connected 246	groups in address books 114	viewing 63
retrieving personal address books 247	items of a specific size 244	Scheduling
retrieving selected items 246	items, Remote 241	appointments 42
retrieving specific items 244, 245	personal address books, Remote 247	meetings across multiple time zones
retrieving subjects only 246	specific items, Remote 245	52
returning to the office 231	Return receipts, getting 266	personal appointments 44, 45
sending items 239	Returning, documents to the library 224	search order, defining Name Completion
setting up 233	Rights	110
setting up on a shared computer 234	document versions, all 176	Searching
smart docking 231	document, specific versions 177	addresses 108
specifying location 258	documents, giving 176	filters 109
specifying time zone 237	granting proxy 96	for available meeting times 45
synchronizing deletions with Master	modify permission, documents 177	Security, passwords 272
Mailbox 238	receiving proxy 96	Selecting
updating Mailbox 235	Routing slip 302	existing annotations 297
user and system information 237	Rules	scanners 299
using Busy Search 248	actions 90	items again 30
verifying you're in 232	copying 94	items from address books 123
viewing pending requests 240	creating 90, 93	items using address books 122
Removing	deleting 94	mail messages 22

notes 50	checking document 180	To do <i>see</i> Tasks
phone messages 23	information, printing 89	Today, go to 74
reminder notes 50	information, saving 102	Toolbar, display settings drop-down list
tasks 47	information, workflows 305	7
Sent items	messages 305	Toolbars 14, 274
checking status of 31	Straight line annotations 296	adding and removing buttons 274
confirming delivery 29	Supported file types 295	customizing 274
displaying 7	Switches 149	displaying annotation 297
retracting 30	synchronize Mailboxes 238	Tracking, workflow status 305
viewing 29	Synchronizing	Transferring calls 262
Sequential workflow 303	address book entries 131	Trash
set alarm in GW Desktop 284	address books 131	opening and emptying 104
Setting		restoring items 104
alarms 75	Т	saving deleted items 105
Notify options 84	task, marking completed in GW	Traveling, using GroupWise 230
Setup	Desktop 284	Turning off Notify 84
integrating applications during 221	Tasks	running on riothy or
integrating document management	accepting 51	U
221	addressing 122	Unarchiving items 87
Remote 233	assigning 48	Undeleting items in your Trash 104
running 2		Unread items 9
Share, address book with another user	changing to other item types 37 checking completion status 50	Unsetting, alarms 75
133		
	declining 51	Updating documents, checked-out 183
Shared Computer, setting up Remote Mailboxes on 234	delegating 39 in GW Desktop 282	Uploading items from Remote 239
Shared folders		Usernames, copying to address books 130
	marking completed 49	Users, addresses 108
posting items 83	personal 49	Osers, addresses 100
replying to items 36	printing 68, 70	V
using 81	reading 66	Versions
Sharing	recurring 54, 57, 58	
documents 174	routing 302	deleting all 188
folders 82	saving 66	deleting document 188
rights to documents 176	scheduling recurring 54	documents, creating 194
Showing appointment information 45	sending 47	documents, storing 194
Smart docking 231	unmarking completed 50	official, specifying 195
Sounds	viewing 63	opening multiple 193
alarms 75	TCP/IP 19	rights to all 176
attaching 28	creating connection in Remote 256	rights to specific 177
Specific versions 194	Telephones, using with GroupWise 260	viewing 195
Specifying address book columns 119	Templates, creating GroupWise 165	view 218
Speed Dial 262	Tentative 44	view an address book's properties 132
Spell Check, automatically 25	Text, printed calendar format 68	view Folder List from GW Desktop 286
Spell-Check, automatically 272	Text annotations 296	Viewing
Spell-checking items 24	Text, finding in items 144	archived items 87
Starting	Text-from-a-file annotations 296	attachments 28
Conversation Place 261	third-party address books, importing	calendar, items as 12
GroupWise 2	116	details, items by 11
Notify 84	Time	different calendar dates 74
Workflow 303	reserve 44, 45	discussion threads, items by 11
Startup	zone 52	document activity 179
dialog box, concepts 17	zone, specifying in Remote 237	document history 179
options 277, 279	Time Out, specifying seconds before	documents when network is down
Status 50	223	218

```
documents, checked-out 182
  group information in address books
    114
  items in QuickViewer 33
  pending requests 240
  schedules 63
  schedules of multiple users 66
  sent items 29
Views
  changing 73
  changing defaults 270
W
Wait interval, specifying for
    non-integrated applications 223
Web-based Information Sites, receiving
    HTML messages from 40
Week
  first day of 74
  offset days 55
Week calendar 73
Wildcard characters 149
Work in Progress folder, saving items in
Work items 304
WorkFlow Central, opening 306
Workflows 302
  attachment types 302
  broadcast 303
  creating 303
  participating in 304
  report 305
  sending reply to originator 304
  sequential 303
  status information 305
  taskbar icon 306
  tracking 305
  work items 304
  WorkFlow Central 306
Y
Year calendar 73
\mathbf{Z}
Zone, time 52
```